

Registrar and Student Services Task Aid

Task Aid Titles

- Log On
- Forgot Password
- Request and Account Using the SAAR Form
- View User Record
- Edit User Record
- Edit User Record via Advanced Forms
- View User Transcript
- View Transcript Status
- Use Global Search
- Register for Instructor-Led Training
- Assign ILTs
- View ILTs in Catalog
- Indicate Interest in a Future Session
- Withdraw from an ILT
- View Instructors for Your Schoolhouse
- Add CSOD User as an Instructor
- Add an External Instructor
- View Facilities for Your Schoolhouse
- Add Facilities for Your Schoolhouse
- Register for Online Training (OLT)
- Assign OLTs
- Submit an Exception Request
- Approve Training Requests
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- Edit Event
- Create Sessions
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- Manage Roster
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- Request External Training Credit Within a Certification
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- Request and Manage a Certification
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- View Submitted Forms
- Request Education/Experience Verification
- Submit an Equivalency/Fulfillment Form
- Approve or Deny Exception Requests

*To foster a high-performing,
qualified civilian acquisition
workforce.*



<https://www.fai.gov/>



FAI@mail.mil

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User Account Management



Log On

When you want to login...

Step 1: Go to URL: <https://dau-stg.csod.com> (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.




Step 2: The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

A screenshot of the DAU Sign In window. The window has a white background with a light gray border. At the top, the DAU logo is displayed in red. Below the logo is a gray silhouette of a person's head and shoulders. Underneath the silhouette is the text "Sign In". Below this is a red rectangular box containing two input fields: "Username" and "Password". A yellow callout bubble with the number "2" points to the "Username" field. Below the input fields is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the text "OR" in the center. Below the line is a blue button labeled "Sign in with CAC Card". At the bottom of the window is the text "Need help signing in?".

Log On (Cont.1)

Step 3: Click Sign In.



Sign In

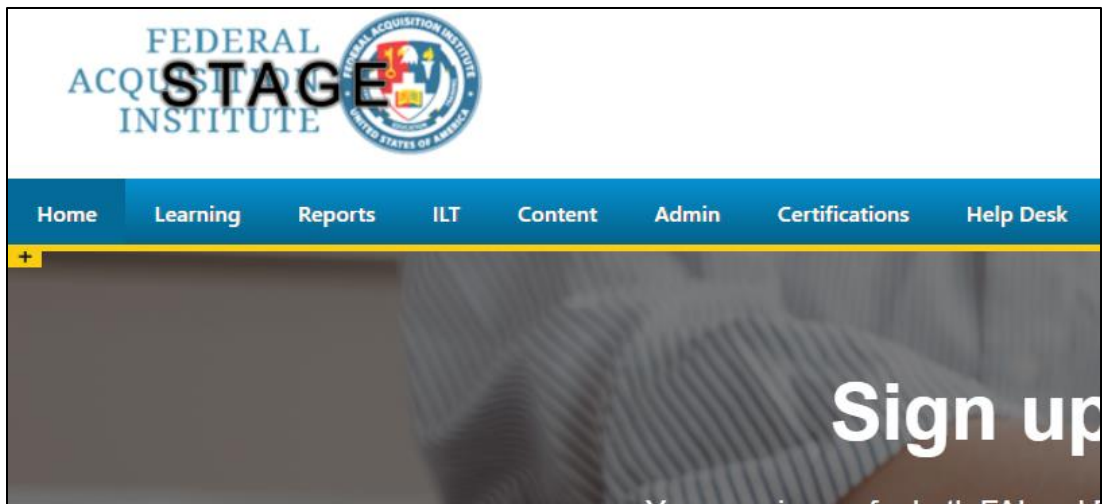
Username

Password

☐ Remember me

3 Sign In

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



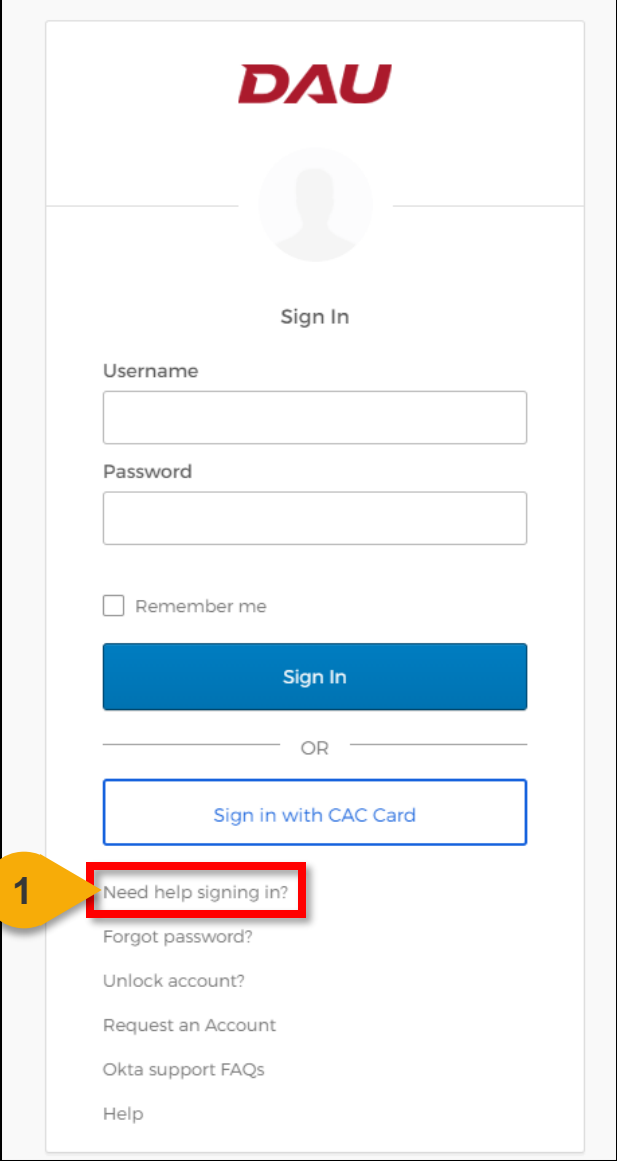
NOTE: If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

Forgot Password

When you can't log on...

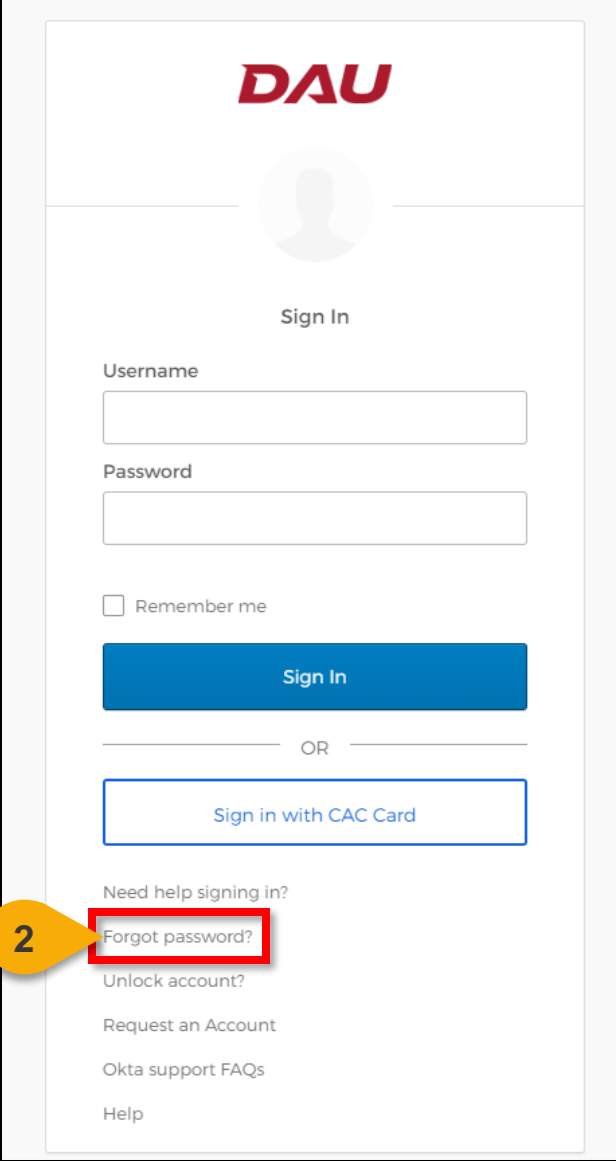
Step 1: If you need help signing in, select the **Need help signing in?** link at the bottom of the window.



The screenshot shows the DAU Sign In page. At the top is the DAU logo. Below it is a placeholder for a user profile picture. The text "Sign In" is centered. There are two input fields: "Username" and "Password". Below these is a checkbox labeled "Remember me". A blue "Sign In" button is present. Below the button is the word "OR" and a button labeled "Sign in with CAC Card". At the bottom, there is a link "Need help signing in?" which is highlighted with a red rectangle and a yellow callout bubble containing the number "1". Below this link are several other links: "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help".

Forgot Password (Cont.1)

Step 2: If you already set up OKTA to reset your password, select the **Forgot Password?** option to have a new password/PIN sent to your email or phone.



The image shows the DAU (Department of Acquisition) Sign In page. At the top is the DAU logo in red. Below it is a grey silhouette of a person's head and shoulders. Underneath the silhouette is the text "Sign In". Below that are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the word "OR" in the center. Below the line is a blue button labeled "Sign in with CAC Card". Below the buttons is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "2" points to the "Forgot password?" link, which is also highlighted by a red rectangular box.

Forgot Password (Cont.2)

Step 3: Select the OKTA support FAQs option and follow the directions for **Q2**.

3

Q2: HELP! I requested a password be sent to me via email, but there is not a password in the email I was sent. Where is my password?

DAU - Okta Password Reset Requested

Hi Teresa,

A password reset request was made for your Okta account. If you did not make this request, please contact the DAU Help Desk dauhhelp@dau.edu immediately.

If you require further assistance, please view the Okta support FAQs or contact the DAU Help Desk using the options below:

[Okta support FAQs](#)

Phone: [703-805-3459](tel:703-805-3459) | [866-568-6924](tel:866-568-6924) | DSN: 655-3459; All Option 1

Email: dauhhelp@dau.edu

A: If you have not completed the account setup process, you will not be able to use the self-service feature to reset your own password. You need to request the DAU Help Desk (DAUHelp@dau.edu) provide you with your login informatin so you can officially setup your account. Include the last 4 of your SSN/EIN/FIN when submitting this request so your account can be validated.

Step 4: Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.

DAU Launch /

Work +

Office 365
Microsoft Office 365 Office Portal

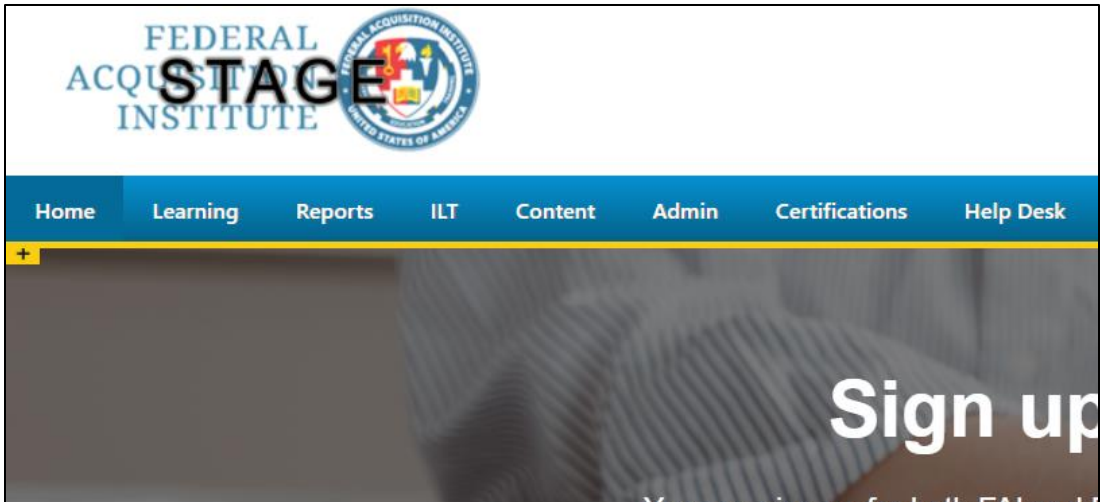
Virtual Campus Pilot

Virtual Campus Stage

4

Forgot Password (Cont.3)

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



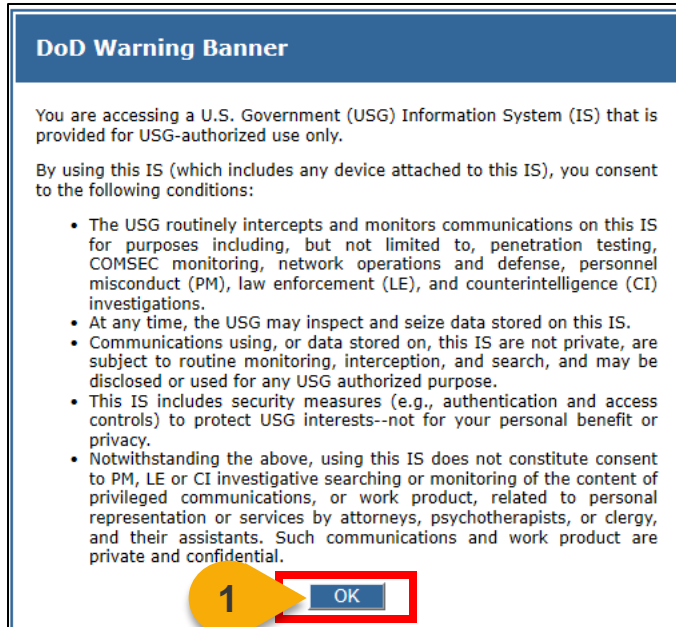
NOTE: If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

Request an Account Using the SAAR Form

When you need to complete the DAU SAAR for access to the Virtual Campus...

Step 1: Navigate to <https://saar.dau.edu>. You will see a DoD Warning Banner. Click "Ok".

A screenshot of a DoD Warning Banner. The banner has a blue header with the text "DoD Warning Banner". Below the header, the text reads: "You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions:". A list of five conditions follows, detailing USG interception and monitoring capabilities, data inspection and seizure, routine monitoring of communications, security measures, and the non-constitutive nature of using the IS for consent. At the bottom right of the banner, there is a red-bordered button labeled "OK". A yellow callout bubble with the number "1" points to this button.

DoD Warning Banner

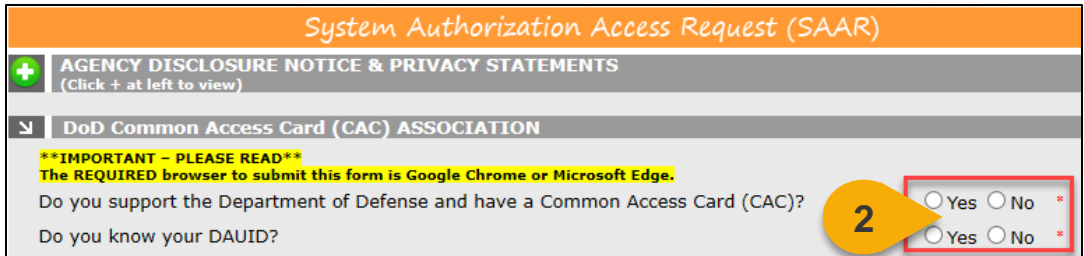
You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

1 OK

Step 2: Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.

A screenshot of the System Authorization Access Request (SAAR) form. The form has an orange header with the text "System Authorization Access Request (SAAR)". Below the header, there are two sections: "AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS" and "DoD Common Access Card (CAC) ASSOCIATION". The "DoD Common Access Card (CAC) ASSOCIATION" section contains a yellow box with the text "**IMPORTANT - PLEASE READ** The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge." Below this, there are two questions: "Do you support the Department of Defense and have a Common Access Card (CAC)?" and "Do you know your DAUID?". Each question has two radio buttons: "Yes" and "No". A yellow callout bubble with the number "2" points to the "Yes" radio button for the first question.

System Authorization Access Request (SAAR)

AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS
(Click + at left to view)

DoD Common Access Card (CAC) ASSOCIATION

****IMPORTANT - PLEASE READ****
The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge.

Do you support the Department of Defense and have a Common Access Card (CAC)? ☐ Yes ☐ No *

Do you know your DAUID? ☐ Yes ☐ No *

2

NOTE: If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS will automatically be filled in.

Request an Account Using the SAAR Form (Cont.1)

Step 3: Under SYSTEM ASSOCIATION you must select “**Virtual Campus (Online Training)**”. If you choose one of the other options, this will significantly delay the process to have an account created to take a course.

SYSTEM ASSOCIATION

Please select a system for which you are requesting access

3 Virtual Campus (Online Training)

Industry Students (Classroom Registrations Only)

DAU Homepage (Knowledge Sharing)

Step 4: Enter the required information in all fields that have not been grayed out.

PERSONAL DETAILS

Foreign National students without a DoD CAC or DAUID can visit the [FAQ website](#) for guidance on establishing an account. DAU account holders must also update their profile in the DAU Identity Management System. Further guidance is provided after submitting this form.

Citizenship Type [] * Designation [] *

SSN/FIN [] *

DAUID [] *

First Name [] * Last Name [] *

Organization [Please Select..] *

Step 5: Enter your **SUPERVISOR DETAILS**.

SUPERVISOR DETAILS

First Name [] * Last Name [] *

Supervisor Email [] * Supervisor Phone [] *

Request an Account Using the SAAR Form (Cont.2)

Steps 6 & 7: Read the USER AGREEMENT and check the “**I Agree**” box. Enter the code, which is not case sensitive, from the image in the box. You can select the green arrows to generate a new code or select the green sound image for the code to be vocalized. Afterwards select the “**Submit**” button.

The screenshot shows a web form titled "USER AGREEMENT". The text of the agreement is visible. Below the text, there is a checkbox labeled "I Agree" with a red box around it and a yellow callout bubble with the number "6" pointing to it. To the right of the checkbox is a large image box containing a code "30016" and a green arrow icon. Below the image box is a text input field with the placeholder "Type the code from the ir" and a green speaker icon. A red box is around the "SUBMIT" button, with a yellow callout bubble with the number "7" pointing to it. At the bottom, there are links for "Contact Us" and "Suggestion Box", and contact information for the DAU Help Desk.

USER AGREEMENT

I accept the responsibility for the information and DoD system to which I am granted access and will not exceed my authorized level system access. I understand that my access may be revoked or terminated for non-compliance with DoD security policies. I accept responsibility to safeguard the information contained in these systems from unauthorized or inadvertent modification, disclosure, destruction and use. I understand and accept that my use of the system may be monitored as part of managing the system, protecting against unauthorized access and verifying security problems. I agree to notify the appropriate organization that issued my account(s) when the access is no longer required.

I Agree ☐

30016

Type the code from the ir

The code is not case sensitive.

SUBMIT

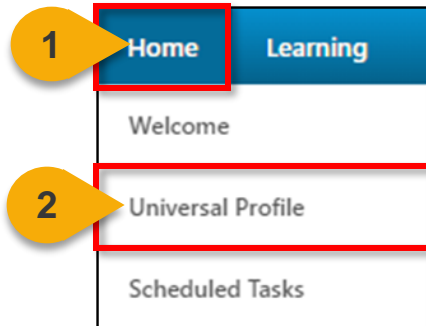
[Contact Us](#) | [Suggestion Box](#) DAU Help Desk [703-805-3459](tel:703-805-3459) | [1-866-568-6924](tel:1-866-568-6924)

IMPORTANT: If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the “**I Agree**” check box again and enter the new code in the image box for your SAAR to be submitted. Select the “**Submit**” button once you have completed the form. Afterwards the screen below will be generated.

View User Record

When you want to view your User Record...

Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



Step 3: To expand a section, click on the **arrow** to the right of that section.

A screenshot of the User Record page. The 'Contact' section is expanded, showing fields for Phone, Email, Personal Email, and Mobile. The 'Settings' section is collapsed, indicated by a blue arrow icon. The 'Organization Structure' section is also collapsed, indicated by a blue arrow icon. A yellow callout bubble with the number '3' points to the blue arrow icon next to the 'Contact' section header.

Contact

Phone: Email:

Personal Email: Mobile:

Settings ▼

Time Zone:

Organization Structure ▼

Manager: HR Admin:

Dean or Director: **Organization:** Department of Education (9AL3)

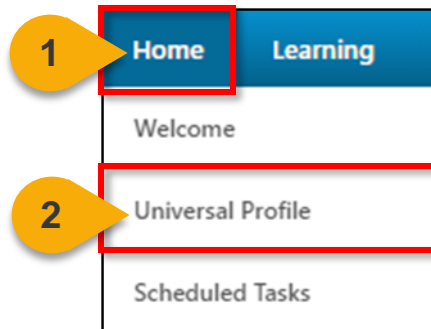
Position: Grade:

Location:

Edit User Record

When you want to edit information on the user record...

Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



Step 3: Click the **Edit Record** button at the bottom left side of the screen to edit your User Record.

To help FAI accurately report training data, it is important that the data you enter on this page is correct.
Click the **Edit** button at the bottom of this page to edit fields.

Name: FAI Employee	User Name: FAI_Employee
User ID: FAI_Employee	
Original Hire Date:	
Active Status: Active	

Edit Record

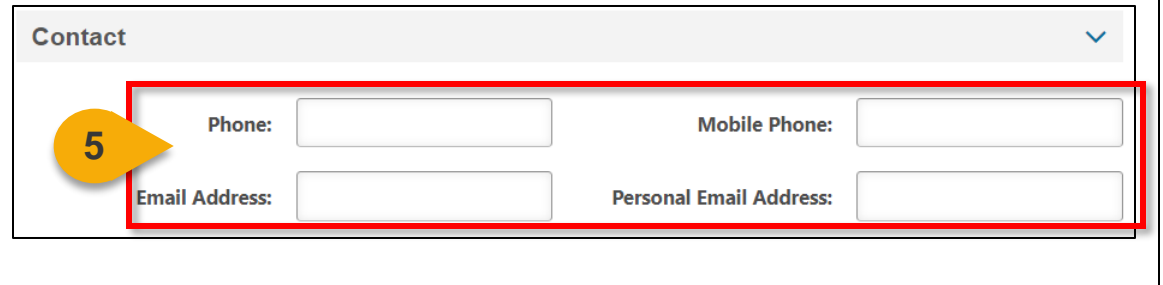
Step 4: In the first section at the top of the screen, you can edit your **First Name**, **Middle Name**, **Last Name**, and **User Name**.

Edit User Record

First Name: *	FAI
Middle Name:	
Last Name: *	Employee
User Name: *	FAI_Employee

Edit User Record (Cont.1)

Step 5: In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**



Contact

5

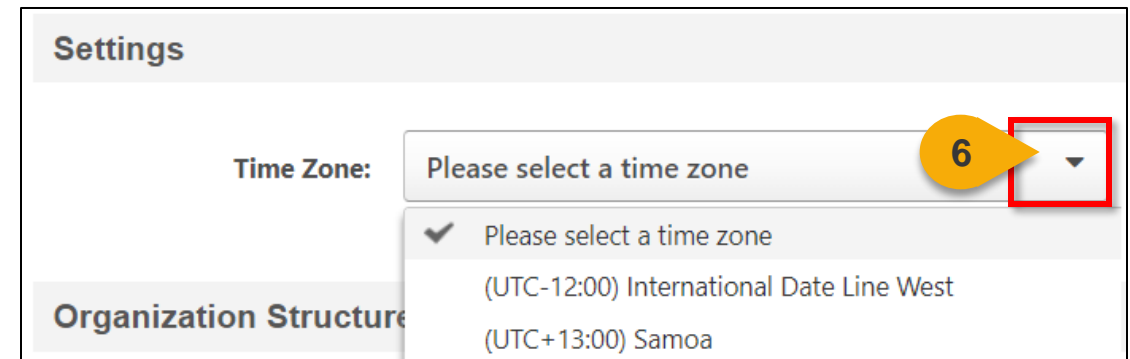
Phone:

Mobile Phone:

Email Address:

Personal Email Address:

Step 6: In the Time Zone section, you can click the dropdown to select the appropriate time zone for your location.



Settings

Time Zone: Please select a time zone

6

✓ Please select a time zone

(UTC-12:00) International Date Line West

(UTC+13:00) Samoa

Organization Structure

Step 7: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location.**



Organization Structure

7

Manager:

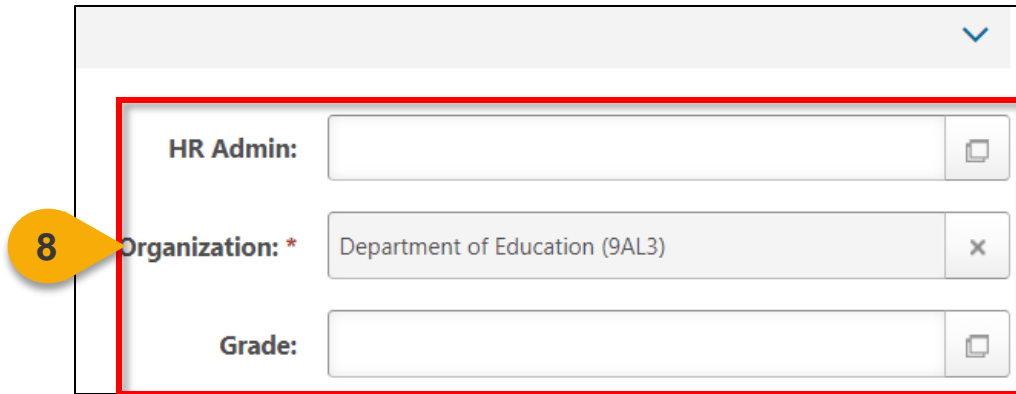
Dean or Director:

Position:

Location:

Edit User Record (Cont.2)

Step 8: In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**

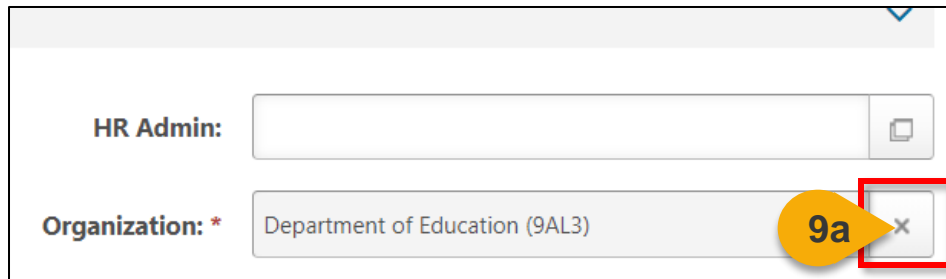


HR Admin:

8 Organization: * Department of Education (9AL3)

Grade:

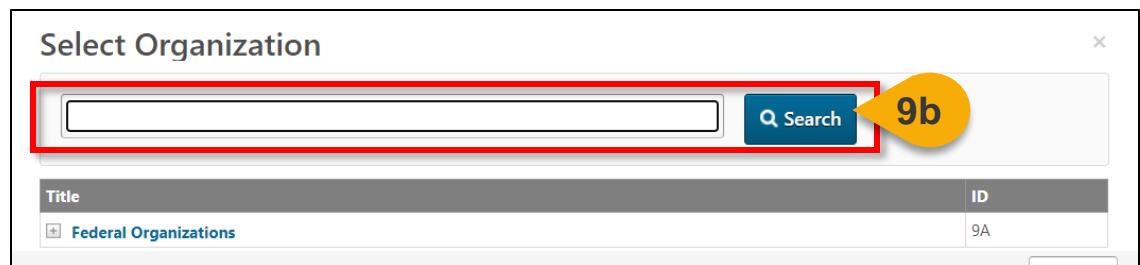
Step 9a: To search for your organization, Click on the **box** next to Organization. A popout box will appear.



HR Admin:

Organization: * Department of Education (9AL3)

Step 9b: You can manually enter the name of your organization in the **search box.**



Select Organization

Title	ID
<input type="checkbox"/> Federal Organizations	9A

Edit User Record (Cont.3)

Step 9c: You can also click **Federal Organizations** to drill down to see more organizations and search manually.

Select Organization

Search

Title	ID
Federal Organizations	9A

Step 9d: Click on the name of your **organization** to add it to your User Record.

Select Organization

All » Federal Organizations

Search

Title	ID
ATRRS Federal Orgs	AFO
Department of Agriculture	9ALA
Department of Commerce	9ALB
Department of Education	9AL3

Step 10: In the Other Demographics section, you have the option to fill in additional information on your demographics such as **Work City, Zip Code, Disability, etc.**

Other Demographics

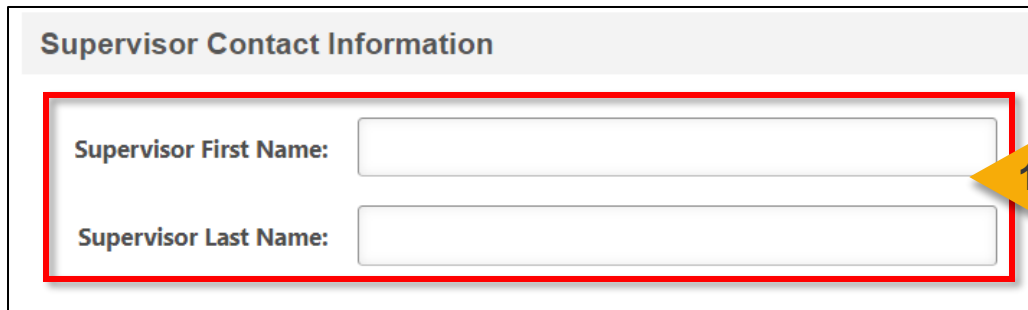
Work City:

Work Zip Code:

Disability: ☐

Edit User Record (Cont.4)

Step 11: In the Supervisor Contact Information section, you can fill in the **first and last name** of your supervisor.



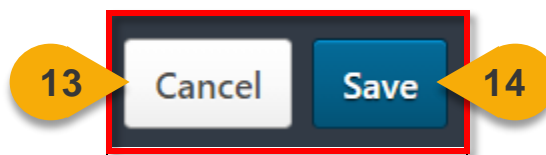
The image shows a form titled "Supervisor Contact Information". Inside the form, there are two input fields. The first field is labeled "Supervisor First Name:" and the second field is labeled "Supervisor Last Name:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "11" points to the "Supervisor Last Name:" field.

Step 12: In the Supervisor Contact Information section, you can also enter your **Supervisor's Phone and Email**.



The image shows the same "Supervisor Contact Information" form. Below the name fields, there are two more input fields. The first field is labeled "Supervisor Phone:" and the second field is labeled "Supervisor Email:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "12" points to the "Supervisor Email:" field.

Steps 13 & 14: Click **Save** to keep all the changes or click **Cancel** to discard the changes.

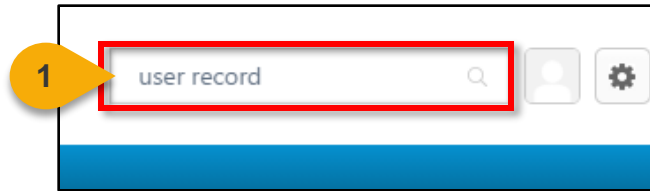


The image shows two buttons: "Cancel" and "Save". The "Cancel" button is light gray and the "Save" button is blue. A red rectangular box highlights both buttons. A yellow callout bubble with the number "13" points to the "Cancel" button, and another yellow callout bubble with the number "14" points to the "Save" button.

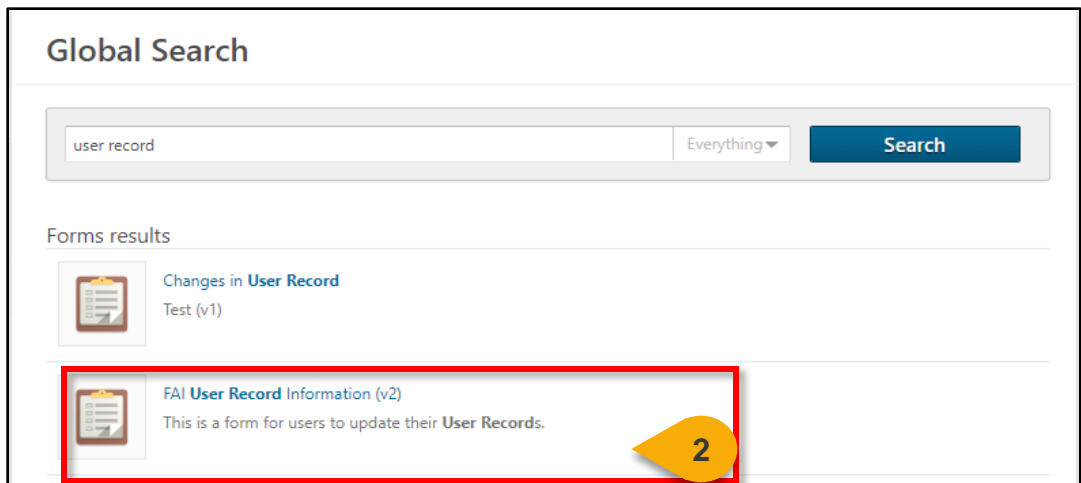
Edit User Record via Advanced Forms

When you want to edit the User Record using Advanced Forms...

Step 1: In the **Global Search** box, type “User Record” and click the magnifying glass.



Step 2: Select the **FAI User Record Information** form.



Edit User Record via Advanced Forms (Cont.1)

Steps 3 & 4: Fill in the form and click **Submit** at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.

FAI User Record Information (v2)

This is a form for users to update their User Records.

All fields marked with an asterisk are required.

3

First Name *

Middle Name

Last Name *

Suffix

Local System ID

Cancel

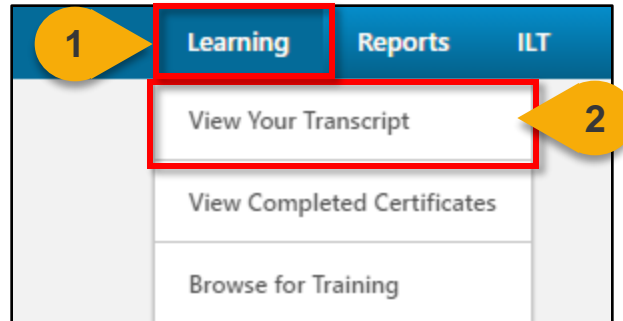
4

Submit

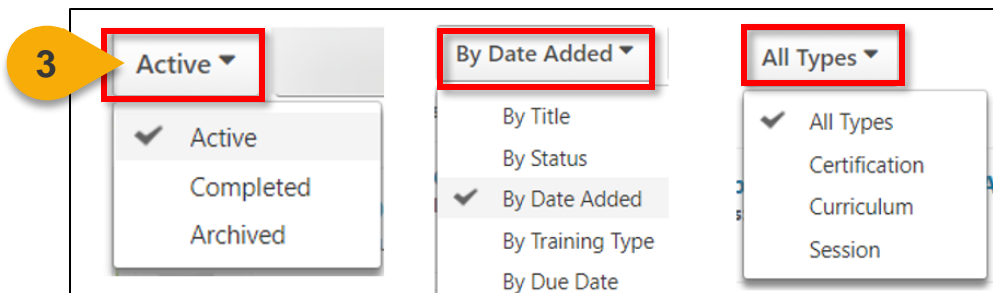
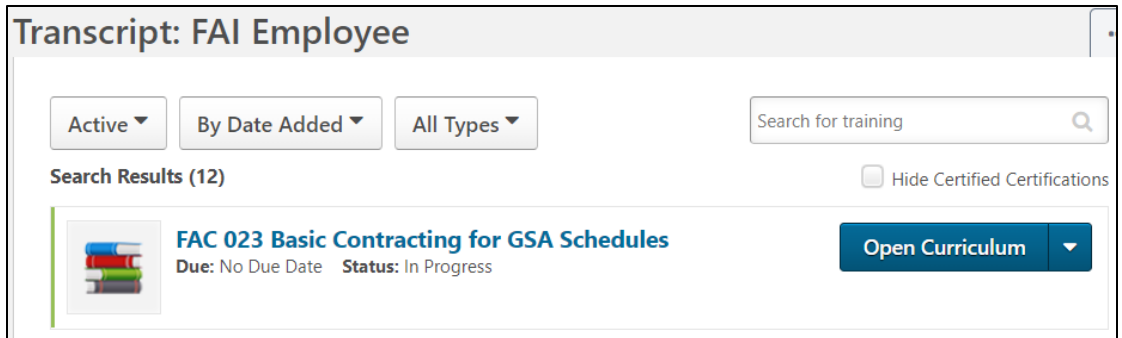
View Transcript

When you want to view your Transcript...

Steps 1 & 2: Hover over the **Learning** tab and then select **View Your Transcript**.



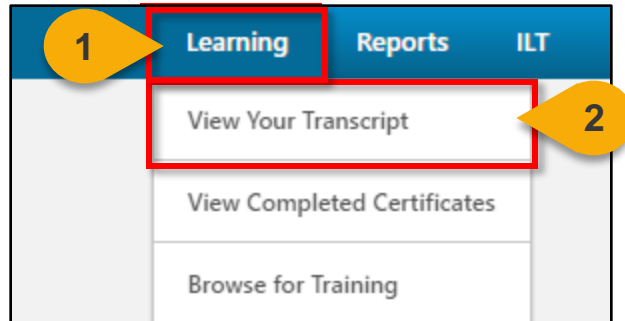
Step 3: You will be taken to your Transcript. You can click the **dropdown arrow** filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the **arrows** by each filter for dropdowns to sort the courses.



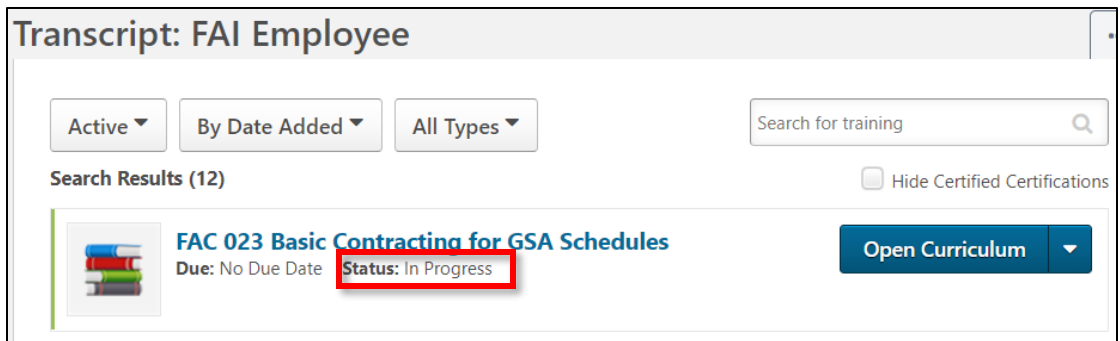
View Transcript Status

When you want to view your Transcript status...

Steps 1 & 2: Hover over the **Learning** tab and then select **View Your Transcript**.



Your Transcript will display in the screen. The **status** of your courses will be listed underneath the title of the course.



Use Global Search

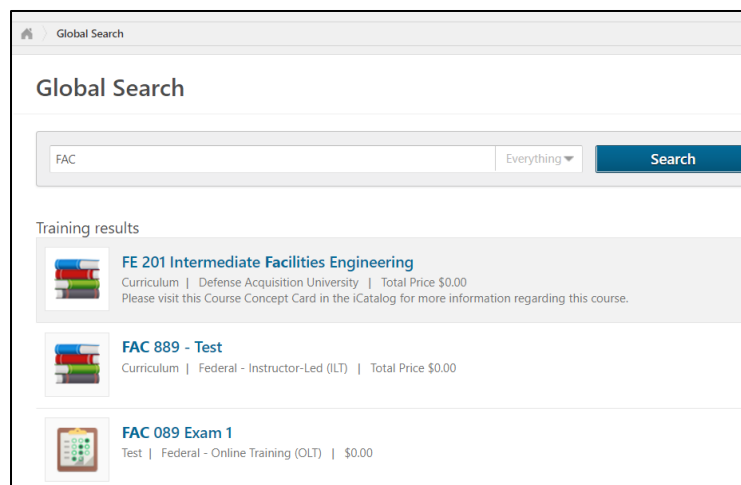
When you want to search for Training, Certifications, or Forms...

Global Search: This predictive search bar, found at the top right of the home page, helps users search for training, certification and forms.

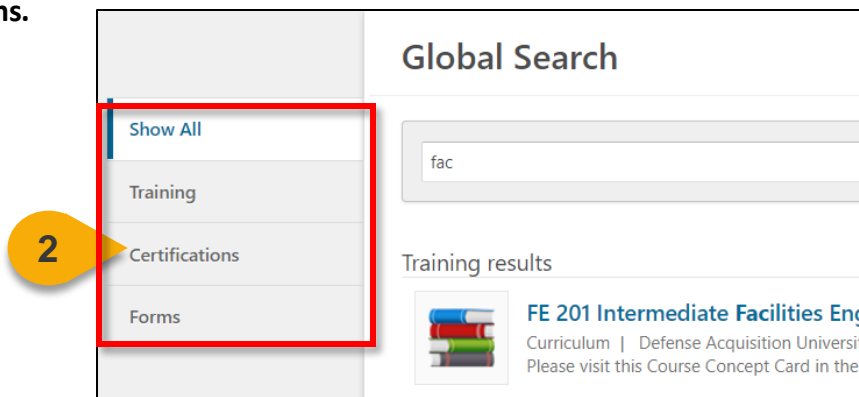
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



The page will refresh, and your results will be listed on the page.



Step 2: To the left of the search bar, you can choose to filter by **Training, Certifications, or Forms.**



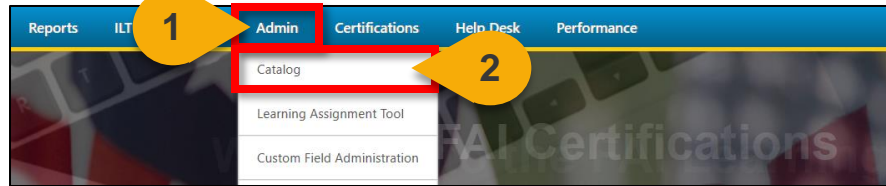
Instructor- Led Training



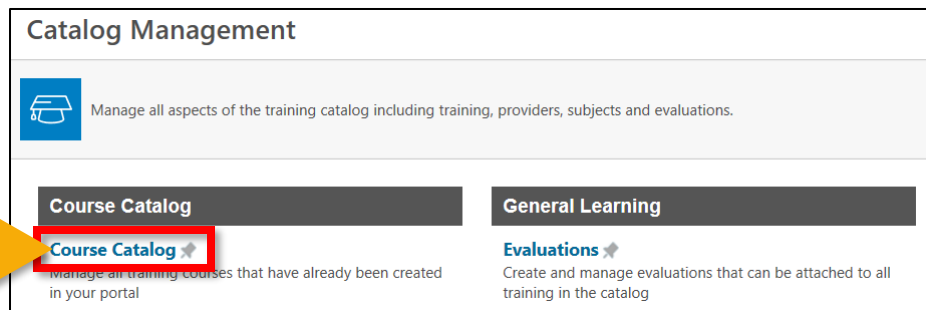
View Instructor-Led Training in Catalog

When you want to view online training...

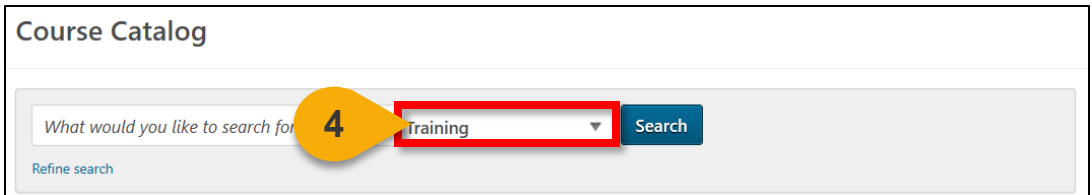
Steps 1 & 2: Go to Admin, then select Catalog.



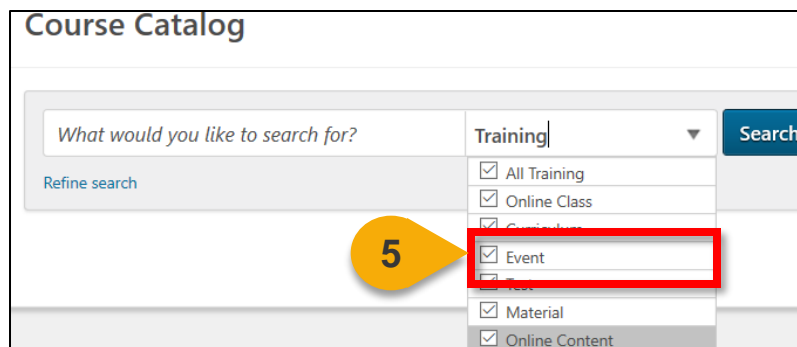
Step 3: Click on Course Catalog.



Step 4: After you enter the name of the course you are searching for click on the Training dropdown next to the search box.

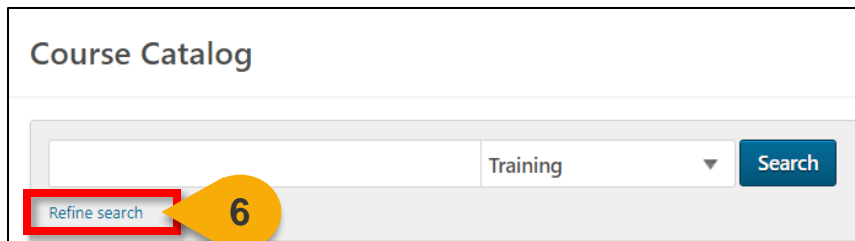


Step 5: Check the box next to Event to filter your search.



View ILT in Catalog (Cont.1)

Step 6: Click Refine Search.



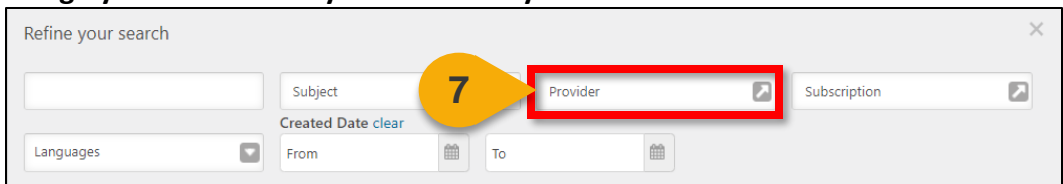
Course Catalog

Training

Search

Refine search

Step 7: Click Provider to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.



Refine your search

Subject

Provider

Subscription

Created Date clear

Languages

From To

Step 7: Select Provider you wish to filter your search results by.



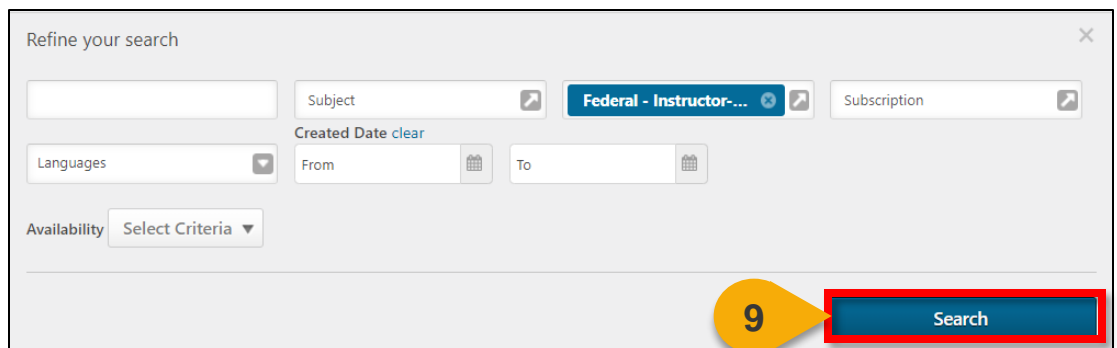
Federal - Homeland Security Acquisition Institute (HSAI)

Federal - Instructor-Led (ILT)

Federal - Online Training (OLT)

Federal - USAID PDT - Center for Continuous Learning

Step 9: Click Search. All relevant ILT will appear in the search



Refine your search

Subject

Federal - Instructor-...

Subscription

Created Date clear

Languages

From To

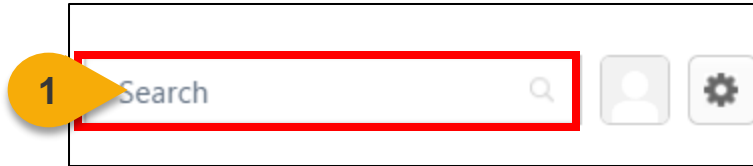
Availability Select Criteria

Search

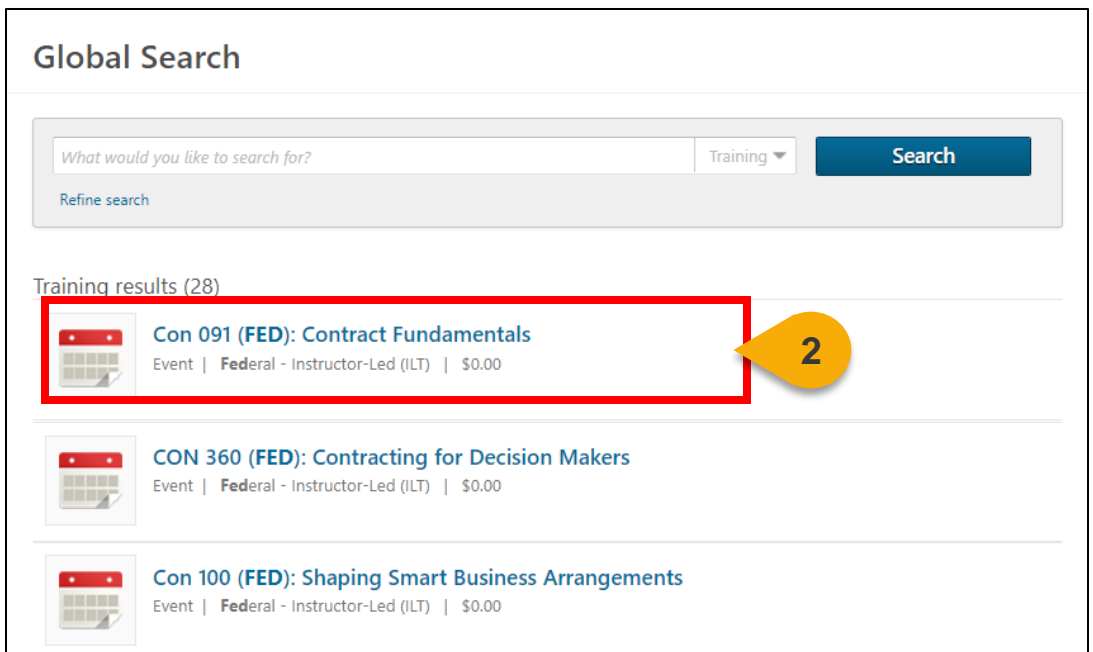
Assign Instructor-Led Training (ILTs)

When you want to assign an instructor led training course to your subordinates...

Step 1: Search for the event that you would like to find using Global Search.



Step 2: Select the **Event** you want to assign to users.



Assign ILTs (Cont. 1)

Step 3: Click **Assign** in the panel on the right to assign the Event but allow the assignee to choose their own Session.

Reports Admin Help Desk Performance

EVENT

Con 100 (FED): Shaping Smart Business Arrangements

Last Updated 11/17/2020

Details

[Show More](#)

Upcoming Sessions

Date (Ascending) ▾

2 Sessions

EVENT

Con 100 (FED): Shaping Smart Business Arrangements

Select a Session ▾


or

3 Assign


Step 4: Enter a **Due Date** for the training, if applicable.

Back Assign Training

Assign Training

 **Con 100 (FED): Shaping Smart Business Arrangements**
Event • Federal - Instructor-Led (ILT) • \$0.00

Select Session

4 Due Date 

Assign ILTs (Cont. 2)

Step 5: Enter any comments in the **Comment box**.

Step 6: You can decide to automatically register subordinates into the ILT (by passing approval workflows) by click the checkbox next to “Automatically Registers Users” (recommended).

The screenshot shows the ILT assignment interface for 'Con 100 (FED): Shaping Smart Business Arrangements'. It includes a 'Select Session' button, a 'Due Date' field, a 'Comment box' (highlighted with a red rectangle and a yellow callout '5'), and an 'Automatically register users' checkbox (highlighted with a red rectangle and a yellow callout '6').

Con 100 (FED): Shaping Smart Business Arrangements
Event • Federal - Instructor-Led (ILT) • \$0.00

Select Session

Due Date

Add a Comment

☐ Automatically register users

Step 7: Select the **subordinates** you want to assign the training to. You may assign to your direct and indirect subordinates.

The screenshot shows the subordinate selection interface. It includes a blue header bar with an information icon and the text 'Users who have the training already in their transcript are not included in'. Below this is a table with columns for 'Direct Subordinates' and 'Language Equivalency'. A row is highlighted with a red rectangle and a yellow callout '7', showing a checkbox, a user icon, and the name 'FAI Student9'.


Users who have the training already in their transcript are not included in


<input type="checkbox"/>	Direct Subordinates	Language Equivalency
<input type="checkbox"/>	FAI Student9	


Assign ILTs (Cont. 3)

Step 8: Click the **Submit** button at the bottom of the page.

Users who have the training already in their transcript are not included in this assignment

<input type="checkbox"/>	Direct Subordinates	Language Equivalency	Assignment History	Current Status	Include Subordinates
<input type="checkbox"/>	 FAI Student9		0	None	

Select an Indirect Subordinate 

Select a User from a Cost Center | Appr... 

Indirect Subordinates	Language Equivalency	Assignment History	Current Status
-----------------------	----------------------	--------------------	----------------

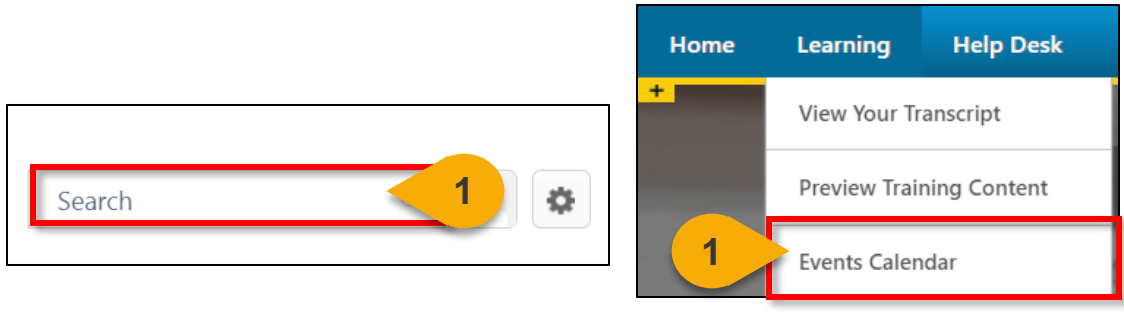
8

Submit

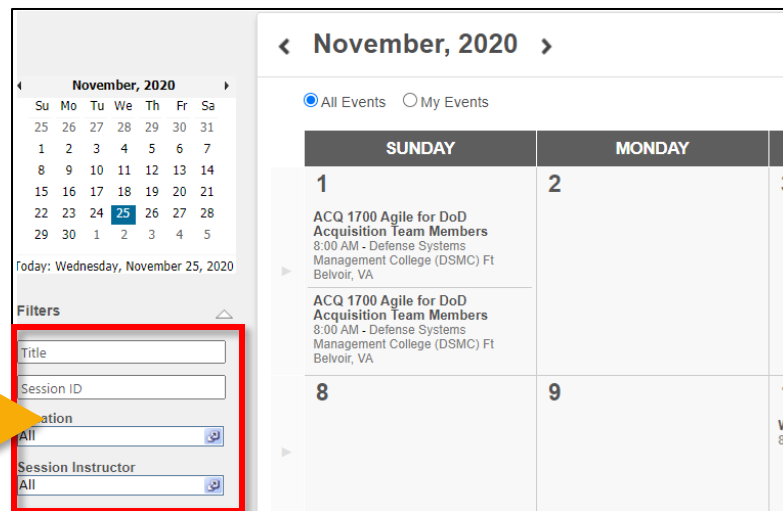
Register for Instructor-Led Training (ILT)

When you want to register for an Instructor Led Training...

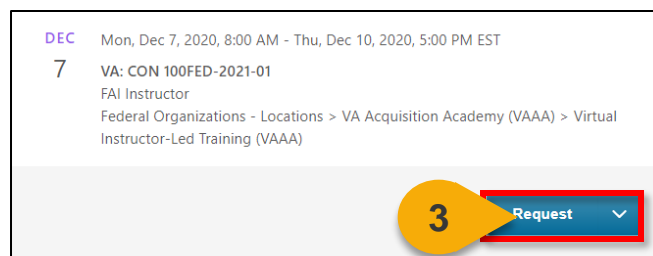
Step 1: Use **Global Search** or **Events Calendar** to find the instructor-led training course you'd like to take.



Step 2: On the Events Calendar, you can search by Title, Session ID, Subject, or Instructor.



Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request**.



Indicate Interest in a Future Session

When you want to express interest in a course once new Sessions become available...

Steps 1 & 2 : Using **Global Search**, search for the Event you'd like register for. Click on the **Event Title**.

Global Search

What would you like to search for? Training Search

Refine search

Training results (132)

CMC 200 Fees, Financing, and Payments

Event | Defense Acquisition University | \$0.00

Please visit this Course Concept Card in the iCatalog for more information regarding this course. You can apply for this course at <https://www.dau.edu/training/p/apply-for-a-course>

Step 3: On the on the Event page, click either the **Notify Me** or **Notify Me of New Sessions** button.

Notify Me

EVENT

Select a Session

Save for Later

Notify Me of New Sessions

Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.

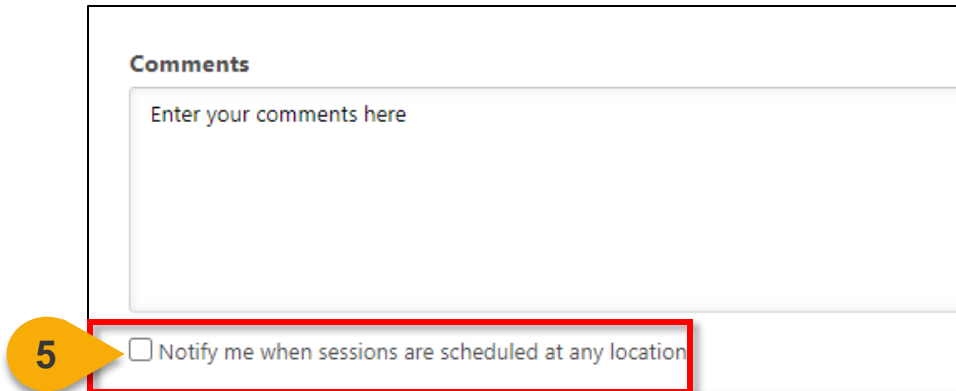
Interest Tracking

Location

Select a Location

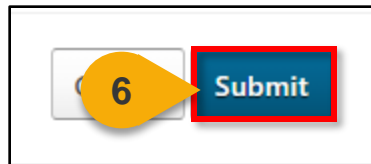
Indicate Interest in a Future Session (Cont. 1)

Step 5: Enter any comments and to be notified for all sessions in any location, check the box next to **“Notify me when sessions are schedule at any location”**.



The screenshot shows a registration form with a 'Comments' section. The 'Comments' section has a text area with the placeholder text 'Enter your comments here'. Below the text area, there is a checkbox labeled 'Notify me when sessions are scheduled at any location'. A yellow callout bubble with the number '5' points to the checkbox. A red rectangular box highlights the checkbox and its label.

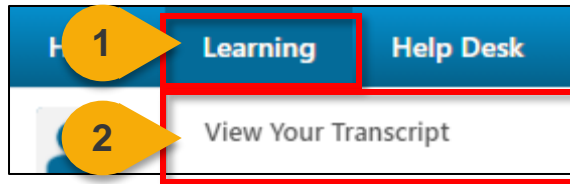
Step 6: Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.



Withdraw from an ILT

When you need to withdraw from an ILT course...

Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript**.



Step 3: Search and find the course you wish to withdraw. Select **Withdraw**.



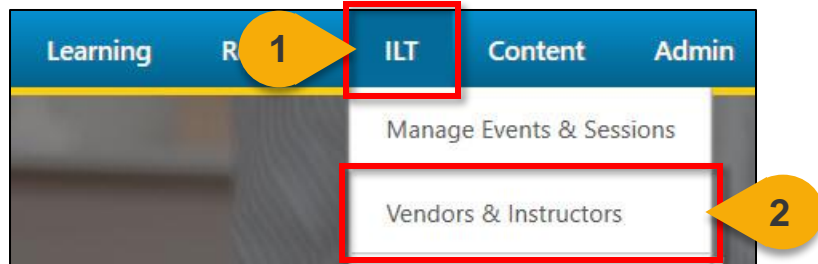
Step 4 & 5: Select a reason for withdrawal and then click **Submit**.

A screenshot of the 'Withdraw Registration' form. At the top, it says 'If you withdraw your registration for this session, you will immediately be withdrawn from the roster.' Below this is a section titled 'Session Details' with the following information: Event Name: Con 100 (FED): Shaping Smart Business Arrangements, Date / Time: (1) 12/7/2020 8:00 AM - 12/10/2020 5:00 PM, Location: Virtual Instructor-Led Training (VAAA), Price: \$0.00. Below this is a section titled 'SESSION WITHDRAWAL OPTIONS'. A dropdown menu is open, showing a list of reasons for withdrawal: 'Please select a reason', 'Please select a reason', 'Other', 'Illness/Family Emergency', 'Inclement Weather', 'Leave', 'No Longer Needed', 'Reschedule Due to Conflict', 'TDY', 'Technology Issue', and 'Workload'. A yellow callout bubble with the number '4' points to the dropdown menu. At the bottom of the form are two buttons: 'Submit' and 'Cancel'. A yellow callout bubble with the number '5' points to the 'Submit' button.

View Instructors for Your Schoolhouse

When you want to view available Instructors...

Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: Click on the **Instructors** link to the right of the Vendor or Training Provider for which you wish to view Instructors.

A screenshot of a table titled 'Vendors'. The table has columns: VENDOR NAME, CONTACT NAME, PHONE, ACTIVE, EDIT, and INSTRUCTORS. The 'Instructors' link for the 'Federal - Instructor-Led (ILT)' vendor is highlighted with a red box and a yellow callout bubble with the number '3'.

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

Step 4: You will then be directed to the **Instructors** page. From here, you can take action to **view their schedule**, **inactivate the Instructor**, or **edit their information**.

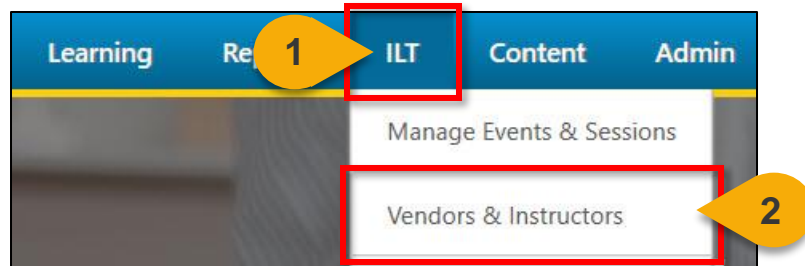
A screenshot of a table titled 'Instructors'. The table has columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The 'View' link for the first instructor is highlighted with a red box and a yellow callout bubble with the number '4'.

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	

Add CSOD User as an Instructor

When you want to add an Instructor who is already a CSOD user...

Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: To the right of the appropriate Vendor, click the **Instructors** link.

A screenshot of a table titled 'Vendors'. The table has columns: VENDOR NAME, CONTACT NAME, PHONE, ACTIVE, EDIT, and INSTRUCTORS. The 'INSTRUCTORS' column contains links for each vendor. The link for 'Federal - Instructor-Led (ILT)' is highlighted with a red box and a yellow callout '3'.

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

Step 4: On the Instructors page, click the **Add New Instructor** link.

A screenshot of a page titled 'Instructors'. At the top left, there is a link 'Add New Instructor' with a plus icon, highlighted with a red box and a yellow callout '4'. Below the link is a table with columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The table contains four rows of data, all with 'Federal Organizations - Locations' in the first two columns.

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	

Add CSOD User as an Instructor (Cont. 1)

Step 5: Click on the (select an existing User) pop out next to the Last Name field.

Edit Instructor

Instructor Name: First Name Last Name (select an existing user)

Home Location:

Phone:

Fax:

E-mail:

Language(s) Spoken:

Education:

Biography:

Certifications:

Active: ☐

Step 6: Search for the User by First Name, Last name, or User ID. Click Search or hit Enter.

Find user

Search

Enter a last name and click the search icon.

Last Name: First Name: ID:

Step 7: In the search results, select the **Name** of the Instructor you wish to add.

Select a user « Previous 1-3 of 3 Next »

NAME	ORG UNIT
Instructor, FAI	organizations
Instructor 2, FAI	Federal Organizations
Instructor2, FAI	Acquisition Professional Career Program

Add CSOD User as an Instructor (Cont. 2)

Step 8: The User's name will appear in the Edit Instructor panel of the Add Instructor page. Click the pop out next to Home Location to choose a location the Instructor will teach at.

Edit Instructor

Instructor Name: First Name: FAI Last Name: Instructor (select an existing)

Home Location: [dropdown icon]

Phone: [text field]

Fax: [text field]

E-mail: [text field]

Language(s) Spoken: [text field]

Education: [text field]

Biography: [text field]

Certifications: [text field]

Active: ☒

Approval Required: ☐

Cancel Submit

Step 9: A new window will open. Click on the gray + next to Federal Organizations – Locations to drill down to the location you would like to select.

Hierarchy		
ADD	TITLE	ID
+	4th Estate DACM	4E
+	ABC Location	
+	Client Admin Location	CAL
+	Cornerstone Admin Location	CSAL
+	Defense Acquisition University (DAU)	Defense Acquisition University (DAU)
+	Defense Media Activity (DMA)	DMA
+	Defense Security Cooperation University (DSCU)	DSCU
+	Defense Threat Reduction Agency (DTTRA)	DTTRA
+	Department of Defense Education Activity (DoDEA)	DoDEA
+	Federal Organizations - Locations	FO_Locations

Step 10: When you find the location you need, click the **blue +** next to it to select it.

10



Virtual Instructor-Led Training (FAI)

VILT_FA1

Add CSOD User as an Instructor (Cont. 3)

Step 11: The location will appear on the Edit Instructor panel on the Add Instructor page. You may fill in any additional information if desired. Then, click Submit to add the Instructor.

Add Instructor

Edit Instructor

Instructor Name: First Name: FAI Last Name: Instructor (select an existing user)

Home Location: Virtual Instructor-Led Training (FAI)

Phone:

Fax:

E-mail:

Language(s) Spoken:

Education:

Biography:

Certifications:

Active: ☒

Approval Required: ☐

11

Step 12: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.

[Add New Instructor](#) « Previous 1-19 of 19 Next »

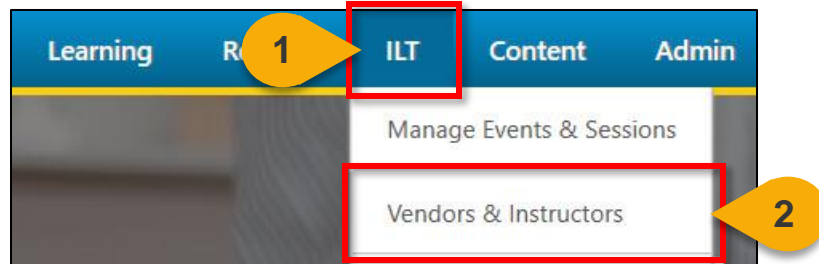
Instructors						
INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	

12

Add an External Instructor

When you want to add an Instructor who is not a CSOD User...

Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: To the right of the appropriate vendor, click the **Instructors** link.

A screenshot of a table titled 'Vendors'. The table has columns: VENDOR NAME, CONTACT NAME, PHONE, ACTIVE, EDIT, and INSTRUCTORS. The 'INSTRUCTORS' column contains links for each vendor. The link for 'Federal - Instructor-Led (ILT)' is highlighted with a red box and a yellow callout bubble with the number '3'.

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

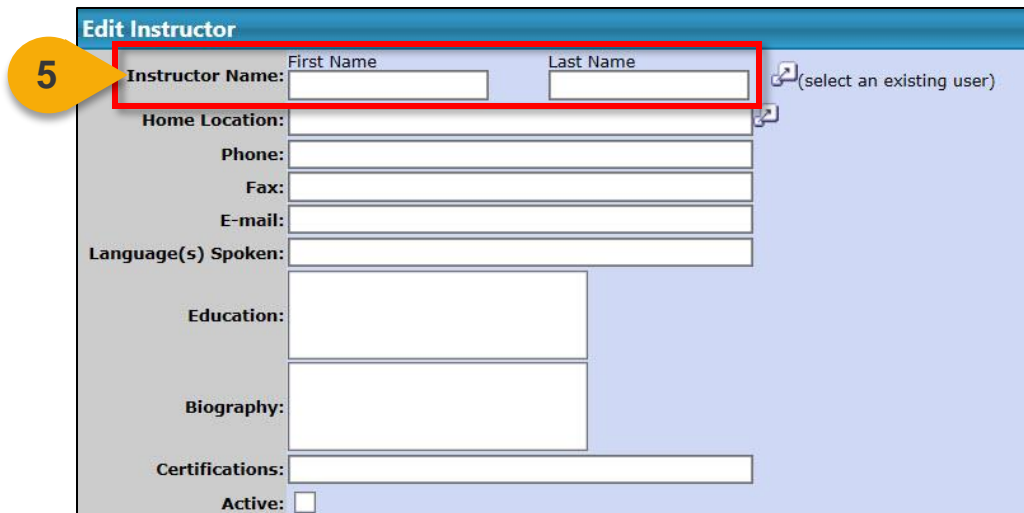
Step 4: Click the **Add New Instructor** link.

A screenshot of a table titled 'Instructors'. The table has columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The 'Add New Instructor' link is highlighted with a red box and a yellow callout bubble with the number '4'.

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	

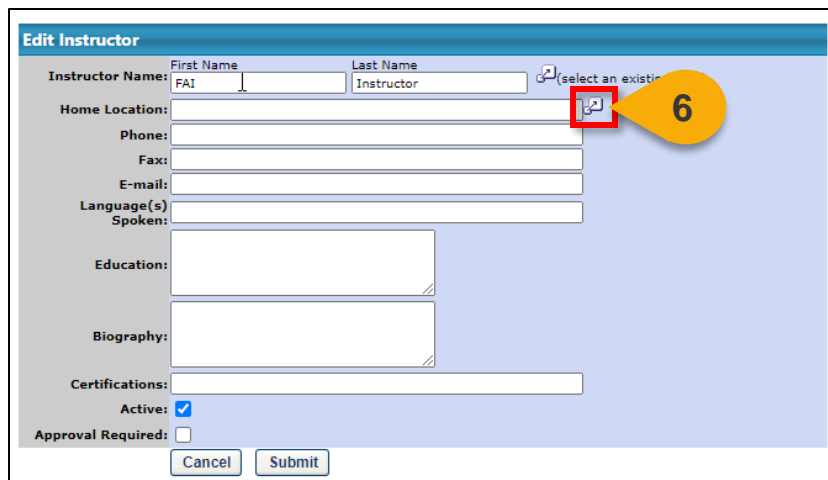
Add an External Instructor (Cont.1)

Step 5: Enter the Instructor's First Name and Last Name.



The screenshot shows the 'Edit Instructor' form. A red rectangular box highlights the 'Instructor Name' section, which contains two input fields: 'First Name' and 'Last Name'. A yellow callout bubble with the number '5' points to this section. To the right of the 'Last Name' field is a dropdown menu with the text '(select an existing user)'. Below the name fields are several other input fields: 'Home Location:', 'Phone:', 'Fax:', 'E-mail:', 'Language(s) Spoken:', 'Education:', 'Biography:', and 'Certifications:'. At the bottom, there is an 'Active:' checkbox which is currently unchecked.

Step 6: Click the pop out next to Home Location to choose a location the Instructor will teach at.



The screenshot shows the 'Edit Instructor' form. A red rectangular box highlights the 'Home Location:' dropdown menu. A yellow callout bubble with the number '6' points to this dropdown. The 'Instructor Name' section now shows 'FAI' in the 'First Name' field and 'Instructor' in the 'Last Name' field. The 'Active:' checkbox is now checked. At the bottom of the form, there are 'Cancel' and 'Submit' buttons. The 'Approval Required:' checkbox is unchecked.

Add an External Instructor (Cont.2)

Step 7: A new window will open. Click on **the gray +** next to Federal Organizations – Locations to drill down to the location you would like to select.

Hierarchy		
ADD	TITLE	ID
	4th Estate DACM	4E
	ABC Location	
	Client Admin Location	CAL
	Cornerstone Admin Location	CSAL
	Defense Acquisition University (DAU)	Defense Acquisition University (DAU)
	Defense Media Activity (DMA)	DMA
	Defense Security Cooperation University (DSCU)	DSCU
	Defense Threat Reduction Agency (DTA)	DTRA
	Department of Defense Education Activity (DoDEA)	DoDEA
	Federal Organizations - Locations	FO_Locations

Step 8: When you find the location you need, click the **blue +** next to it to select it.

	Virtual Instructor-Led Training (FAI)	VILT_FAI
--	---------------------------------------	----------

Step 9: The location will appear on the Edit Instructor panel on the Add Instructor page. You may fill in any additional information if desired. Then, click **Submit** to add the Instructor.

Add Instructor

Edit Instructor

Instructor Name: First Name: FAI Last Name: Instructor (select an existing user)

Home Location: Virtual Instructor-Led Training (FAI)

Phone:

Fax:

E-mail:

Language(s) Spoken:

Education:

Biography:

Certifications:

Active: ☒

Approval Required: ☐

Add an External Instructor (Cont.3)

Step 10: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.

[Add New Instructor](#) « Previous 1-19 of 19 Next »

Instructors						
INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	Edit
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	Edit
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	Edit
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	Edit

10

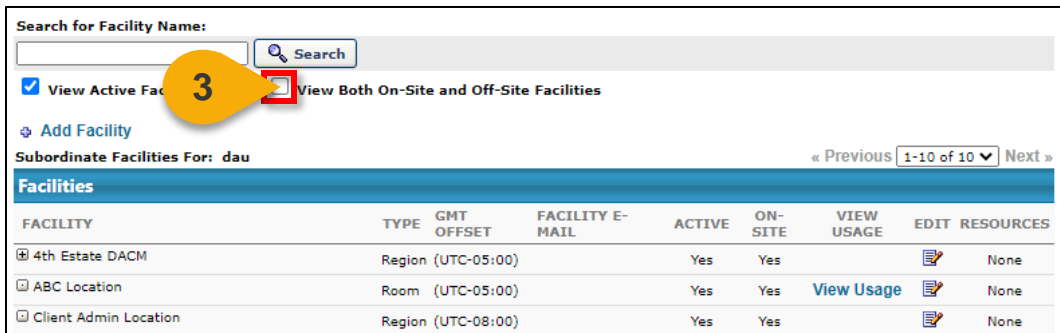
View Facilities for Your Schoolhouse

When you want to view available Facilities...

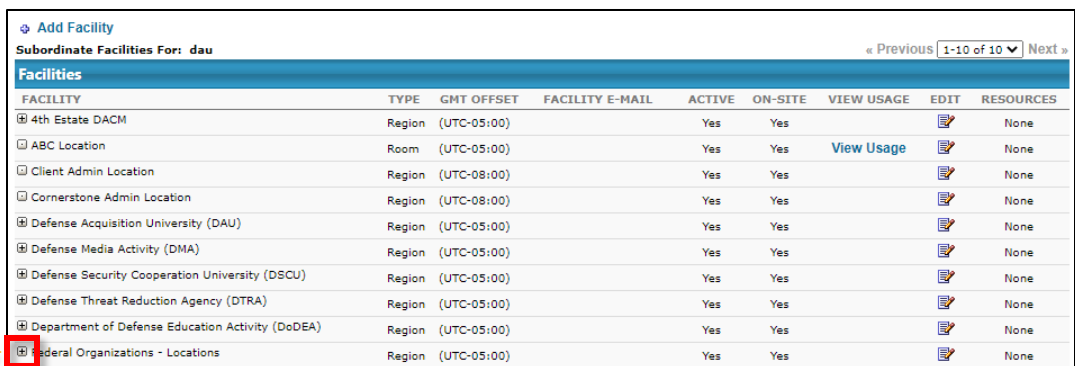
Steps 1 & 2: Hover of the **ILT** tab, then select **Facilities & Resources**.



Step 3: Select **View Both On-Site and Off-Site Facilities** to view both government and non-government Facilities that have been entered.




Step 4: On the Facilities and Resources page, click the **gray +** to drill down into Federal Organizations – Locations to the Facility you wish to view.





View Facilities for Your Schoolhouse (Cont.1)

Steps 5: Click **Edit** icon to view or edit the information for this Facility.

<input type="checkbox"/> Virtual Instructor-Led Training (FAI)	Region (UTC-05:00)	Yes	Yes	5 	None
--	--------------------	-----	-----	--	------

Step 6: View or edit the information for the Facility. Click **Save** to save any information you entered or **Cancel** to exit without saving any information.

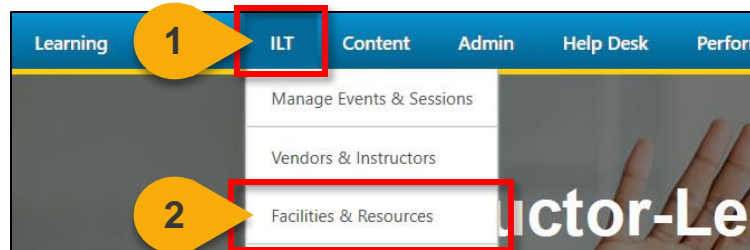
City	<input type="text"/>
State	----- None selected ----- ▼
Postal Code	<input type="text"/>
Time Zone	(UTC-05:00) Eastern Time (US & Canada ▼)
Contact	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>
Occupancy	<input type="text"/>
Approval Required	<input type="checkbox"/>
On Site	<input checked="" type="checkbox"/>

6  

Add Facilities for Your Schoolhouse

When you want to add a Facility...

Steps 1 & 2: Hover of the **ILT** tab, then select **Facilities & Resources**.



Step 3: Click the **Add Facility** link.

The screenshot shows the 'Add Facility' page. At the top, there is a search bar labeled 'Search for Facility Name:' with a 'Search' button. Below the search bar, there are two checkboxes: ☒ View Active Facilities Only and ☐ View Both On-Site and Off-Site Facilities. A yellow callout '3' points to the 'Add Facility' link. Below the checkboxes, there is a table titled 'Facilities' with columns: FACILITY, TYPE, GMT OFFSET, FACILITY E-MAIL, ACTIVE, ON-SITE, VIEW USAGE, EDIT, and RESOURCES. The table contains three rows of data.

FACILITY	TYPE	GMT OFFSET	FACILITY E-MAIL	ACTIVE	ON-SITE	VIEW USAGE	EDIT	RESOURCES
4th Estate DACM	Region	(UTC-05:00)		Yes	Yes			None
ABC Location	Room	(UTC-05:00)		Yes	Yes	View Usage		None
Client Admin Location	Region	(UTC-08:00)		Yes	Yes			None

Step 4: The Create Location page will open. Note Locations and Facilities are used interchangeably in CSOD. In the Define Location section, enter the following information for the Facility/Location: **Name**, a unique **ID**, and a brief **Description**.

The screenshot shows the 'Create Location' page. The 'Define Location' section is highlighted with a red box. It contains three input fields: Name, ID, and Description. A yellow callout '4' points to the 'Define Location' section.

Add Facilities for Your Schoolhouse (Cont.1)

Step 5: In the Details Section, select a **Parent Location**. The Parent Location is the Location/Facility under which this new Location/Facility will appear. You may also choose an individual to be the **Owner** of this Location/Facility. This is optional.



Details

Parent: Defense Acquisition University X

Owner: C

Step 6: Check the **Active** box to make this Facility/Location active in CSOD.




Details

Parent: Defense Acquisition University X

Owner: C

Active: ☒

Step 7: In the **Facility Information** section, Enter as many details as you can to help students find this Facility/Location. Note: The only required field is Time Zone. If you decide to add Occupancy, you won't be allowed to add more registrations than the Occupancy number when creating a Session.



Facility Information

Facility Type: Region

Country: United States

Address #1:

Address #2:

City:

State: None selected

Postal Code:

Time Zone: None selected

Contact:

Phone:

Fax:

Email:

Occupancy:

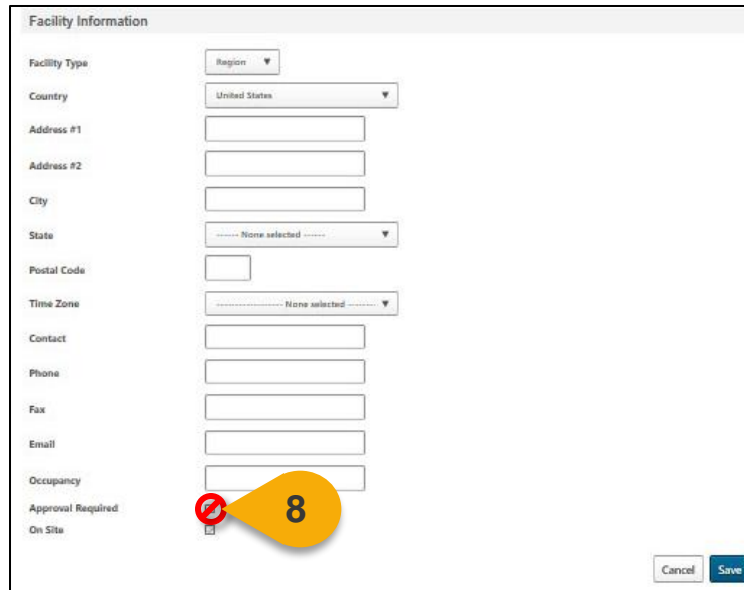
Approval Required: ☐

On Site: ☒

Cancel Save

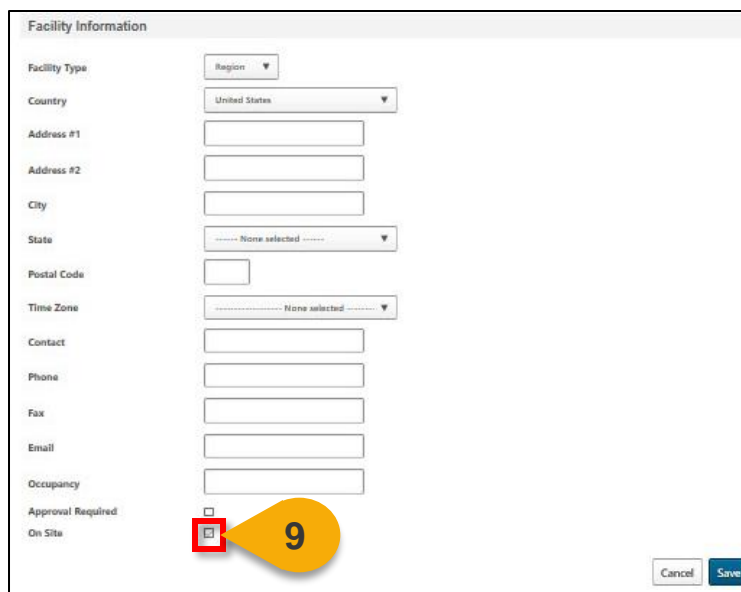
Add Facilities for Your Schoolhouse (Cont.2)

Step 8: Do not check the **Approval Required** box. The Federal Organizations are not using this CSOD feature.



The screenshot shows the 'Facility Information' form. The fields are: Facility Type (Region), Country (United States), Address #1, Address #2, City, State (None selected), Postal Code, Time Zone (None selected), Contact, Phone, Fax, Email, and Occupancy. The 'Approval Required' checkbox is unchecked. A yellow callout bubble with the number 8 and a red prohibition symbol points to the 'Approval Required' checkbox. The 'On Site' checkbox is also unchecked. The 'Cancel' and 'Save' buttons are at the bottom right.

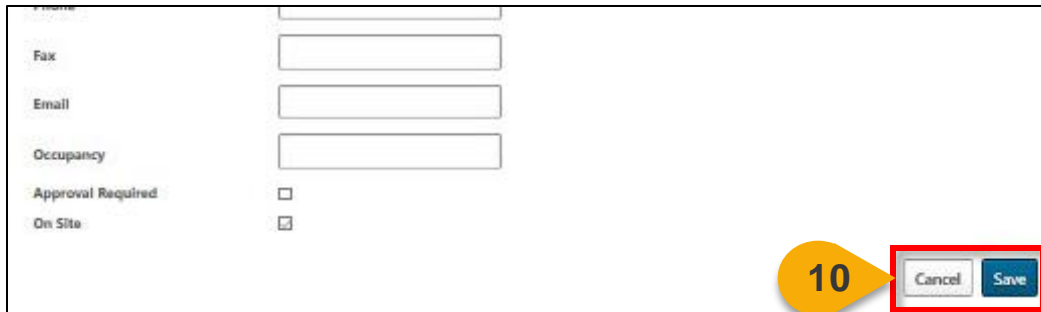
Step 9: Check the **On-Site** box if this is a government Facility/Location. Otherwise, leave this box unchecked.



The screenshot shows the 'Facility Information' form. The fields are: Facility Type (Region), Country (United States), Address #1, Address #2, City, State (None selected), Postal Code, Time Zone (None selected), Contact, Phone, Fax, Email, and Occupancy. The 'Approval Required' checkbox is unchecked. The 'On Site' checkbox is checked. A yellow callout bubble with the number 9 and a red checkmark points to the 'On Site' checkbox. The 'Cancel' and 'Save' buttons are at the bottom right.

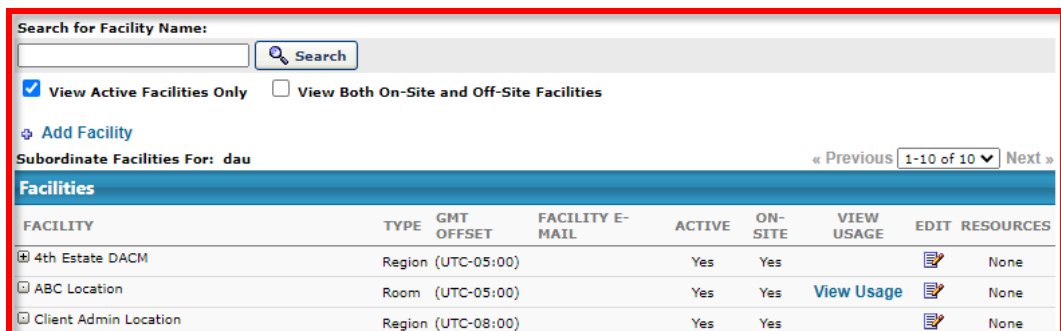
Add Facilities for Your Schoolhouse (Cont.3)

Step 10: Click **Save** to save the Facility/Location. Click **Cancel** to return to the Facility page without saving.



The screenshot shows a form for adding a facility. It includes input fields for Name, Fax, Email, and Occupancy. There are checkboxes for 'Approval Required' and 'On Site'. At the bottom right, there are 'Cancel' and 'Save' buttons. A yellow callout bubble with the number '10' points to the 'Save' button.

You will return to the main **Facilities** page. From here, you can search for and view the Facility/Location you just added or add another Facility/Location.



The screenshot shows the 'Facilities' page. It has a search bar at the top with a 'Search' button. Below the search bar are two radio buttons: 'View Active Facilities Only' (selected) and 'View Both On-Site and Off-Site Facilities'. There is a link to 'Add Facility'. Below this is a section for 'Subordinate Facilities For: dau' with a dropdown menu showing '1-10 of 10'. The main part of the page is a table of facilities.

FACILITY	TYPE	GMT OFFSET	FACILITY E-MAIL	ACTIVE	ON-SITE	VIEW USAGE	EDIT	RESOURCES
4th Estate DACM	Region	(UTC-05:00)		Yes	Yes			None
ABC Location	Room	(UTC-05:00)		Yes	Yes	View Usage		None
Client Admin Location	Region	(UTC-08:00)		Yes	Yes			None

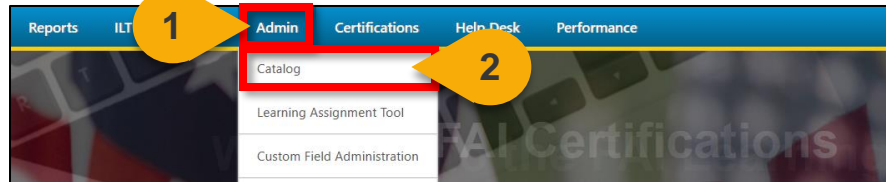
Online Training



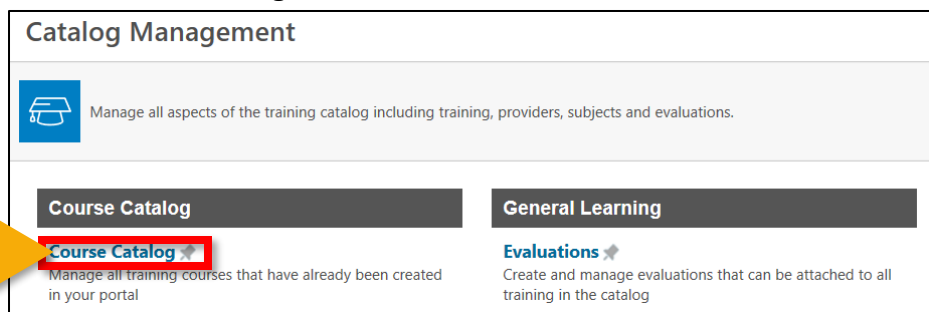
View Online Trainings in Catalog

When you want to view online training...

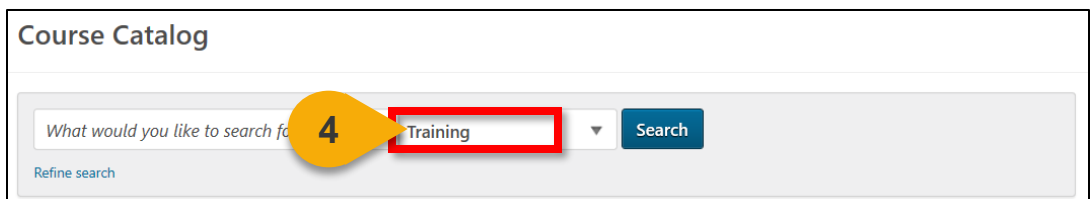
Steps 1 & 2: Go to **Admin**, then select **Catalog**.



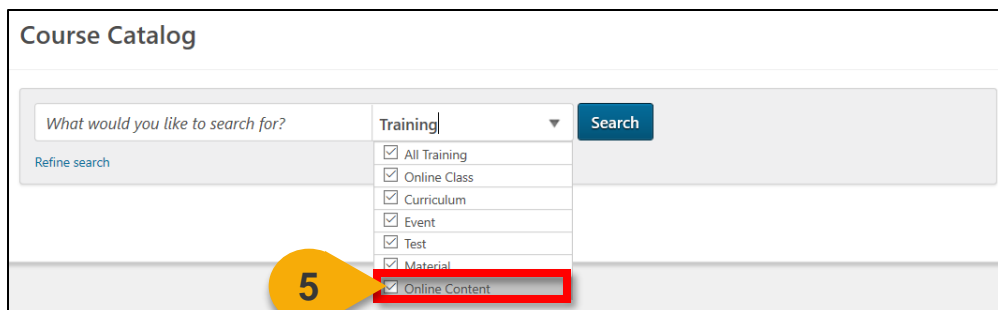
Step 3: Click on **Course Catalog**.



Step 4: After you enter the name of the course you are searching for click on the **Training dropdown** next to the search box.

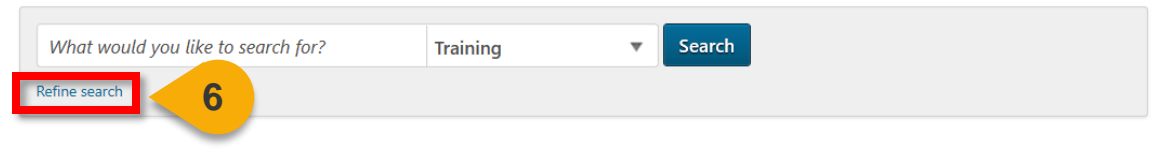


Step 5: Check the **Online Content** box.



View OLT in Catalog (Cont.1)

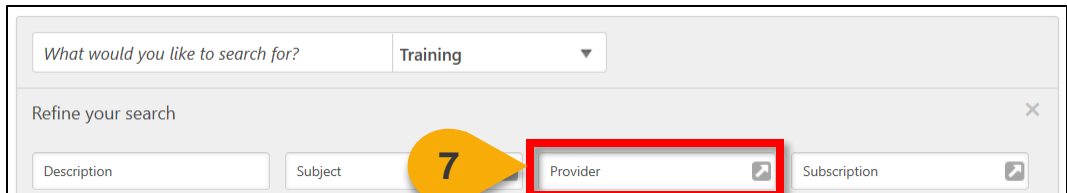
Step 6: Click on **Refine Search**.



What would you like to search for? Training Search

Refine search

Step 7: Click **Provider** to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.

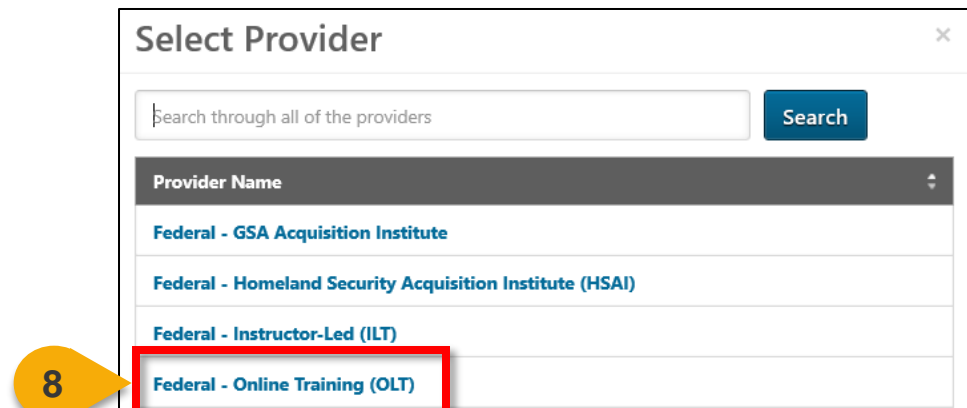


What would you like to search for? Training

Refine your search

Description Subject Provider Subscription

Step 8: Select the **Provider** you wish to filter your search results by.



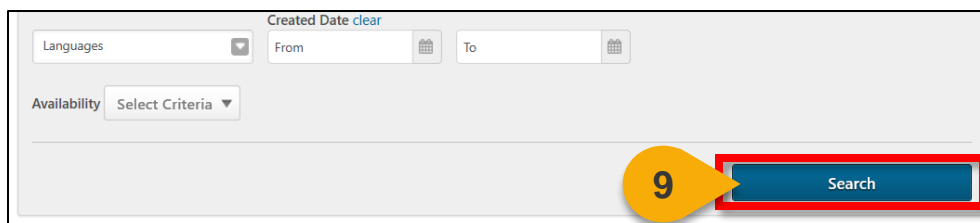
Select Provider

Search through all of the providers Search

Provider Name

- Federal - GSA Acquisition Institute
- Federal - Homeland Security Acquisition Institute (HSAI)
- Federal - Instructor-Led (ILT)
- Federal - Online Training (OLT)

Step 9: Click **Search**. All relevant OLT will appear in the search results.



Languages Created Date clear From To

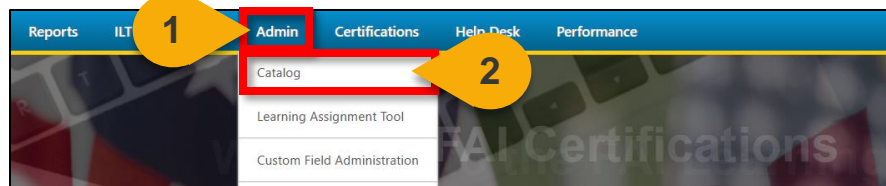
Availability Select Criteria

Search

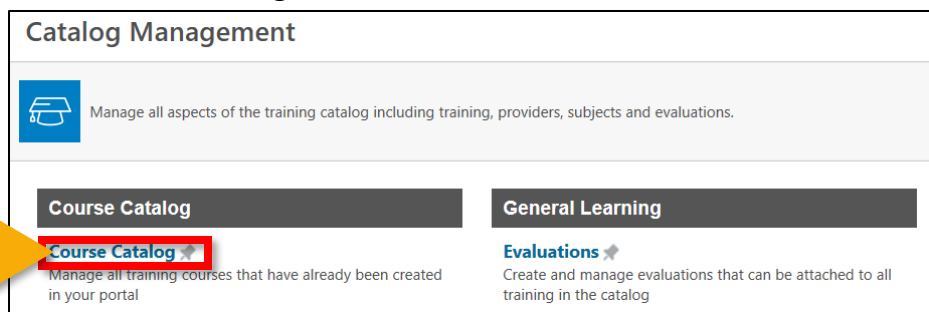
View Online Trainings in Catalog

When you want to view online training...

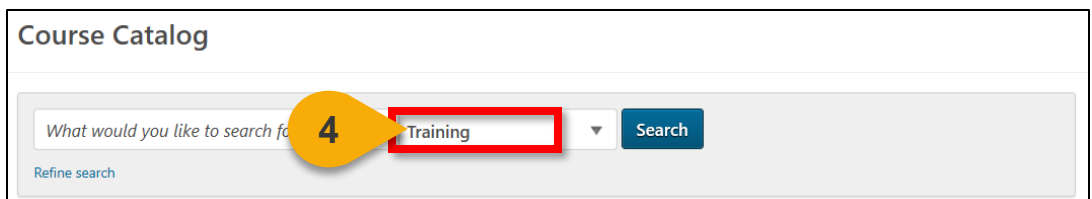
Steps 1 & 2: Go to Admin, then select Catalog.



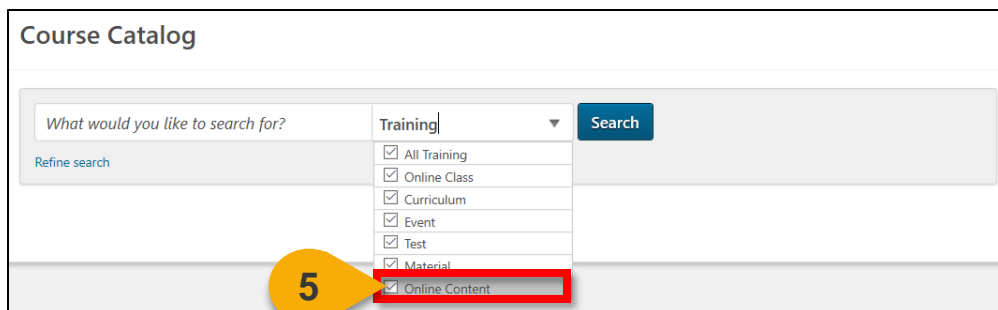
Step 3: Click on Course Catalog.



Step 4: After you enter the name of the course you are searching for click on the Training dropdown next to the search box.

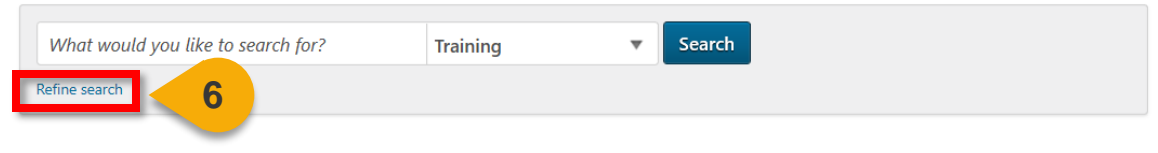


Step 5: Check the Online Content box.



View OLT in Catalog (Cont.1)

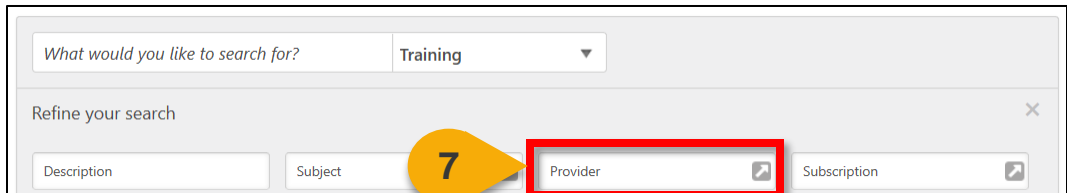
Step 6: Click on Refine Search.



What would you like to search for? Training Search

Refine search

Step 7: Click Provider to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.

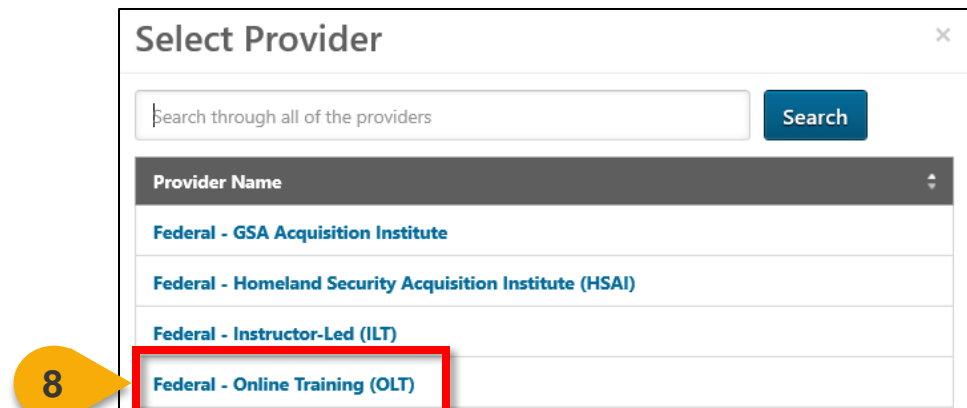


What would you like to search for? Training

Refine your search

Description Subject Provider Subscription

Step 8: Select the Provider you wish to filter your search results by.



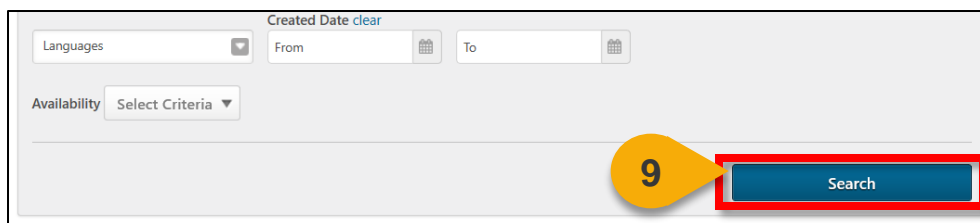
Select Provider

Search through all of the providers Search

Provider Name

- Federal - GSA Acquisition Institute
- Federal - Homeland Security Acquisition Institute (HSAI)
- Federal - Instructor-Led (ILT)
- Federal - Online Training (OLT)**

Step 9: Click Search. All relevant OLT will appear in the search results.



Languages Created Date clear From To

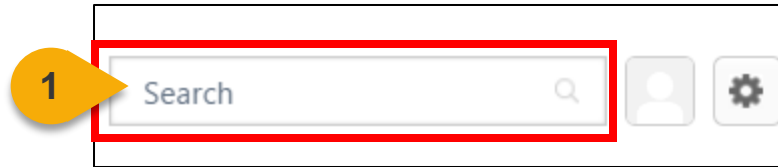
Availability Select Criteria

Search

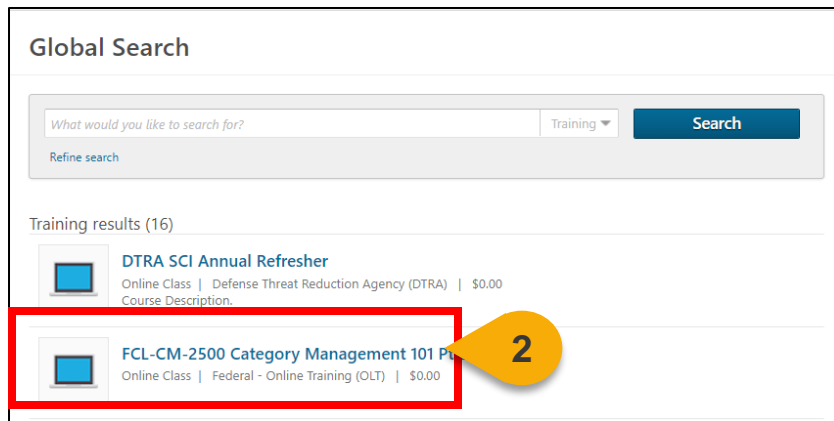
Assign Online Training (OLTs)

When you want to assign an online training to your subordinates...

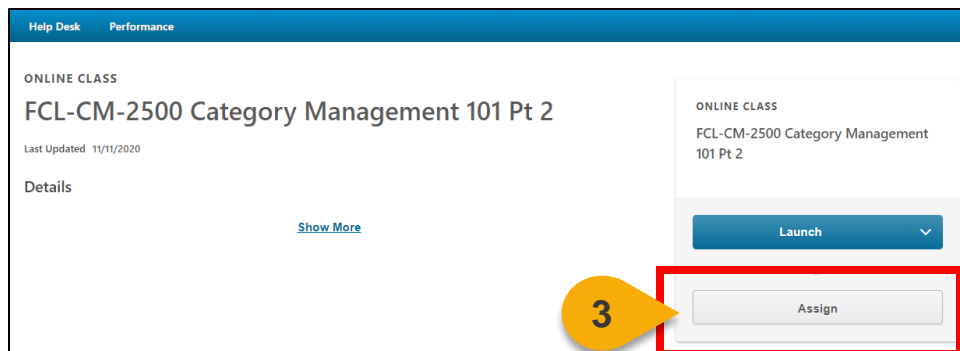
Step 1: Search for the online training that you would like to assign using Global Search.



Step 2: Select the **training you wish to assign.**



Step 3: Click **Assign.**



Assign OLTs (Cont. 1)


Step 4: Select a **Due Date** (if applicable) by clicking on the Calendar icon.

Step 5: Enter any comments in the **Comment box**.

Step 6: You can decide to automatically register subordinates into the ILT by click the **checkbox** next to “Automatically Registers Users” (recommended).



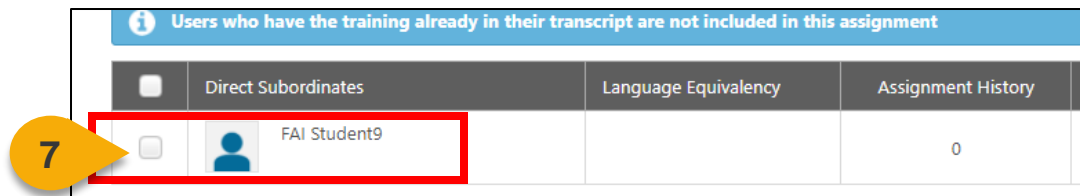
FCL-CM-2500 Category Management 101 Pt 2
Online Class • Federal - Online Training (OLT) • \$0.00


Due Date  4


Add a Comment 5

☐ Automatically register users 6

Step 7: Select the subordinates you want to assign the training to by marking the **checkbox** next to the name of the subordinate. You may assign to your direct and indirect subordinates.



 Users who have the training already in their transcript are not included in this assignment


<input type="checkbox"/>	Direct Subordinates	Language Equivalency	Assignment History
7 <input type="checkbox"/>	 FAI Student9		0


Assign OLTs (Cont. 2)

Step 8: Click the **Submit** button at the bottom of the page.

☐ Automatically register users

Users who have the training already in their transcript are not

<input type="checkbox"/>	Direct Subordinates	Language E
<input checked="" type="checkbox"/>	 FAI Student3	

Select an Indirect Subordinate  Select a User from

Indirect Subordinates	Language Equival

Current Status	Include Subordinates
None	


History	Current Status

8 **Submit**

Register for Online Training (OLT)

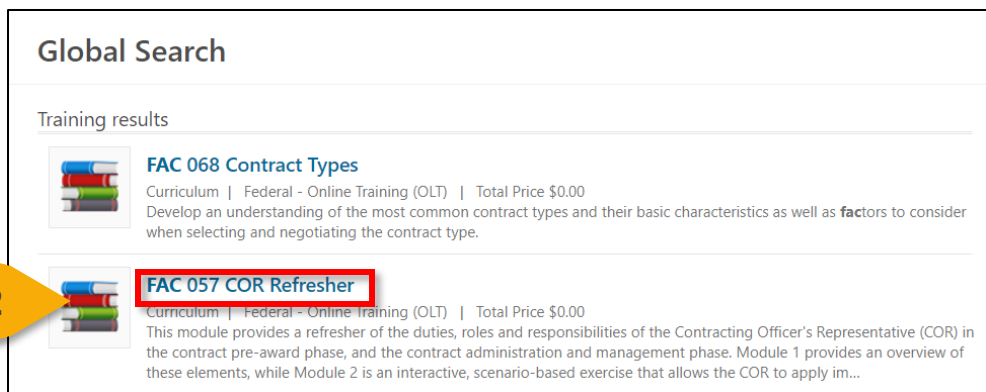
When you want to register for Online Training...

Step 1: Type the name of the OLT you would like to take into the Global Search box and click the **magnifying glass** or hit enter.





A search bar with the word "Search" inside. To the right of the search bar is a magnifying glass icon. A red rectangular box highlights the magnifying glass icon, and a yellow callout bubble with the number "1" points to it.

Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.

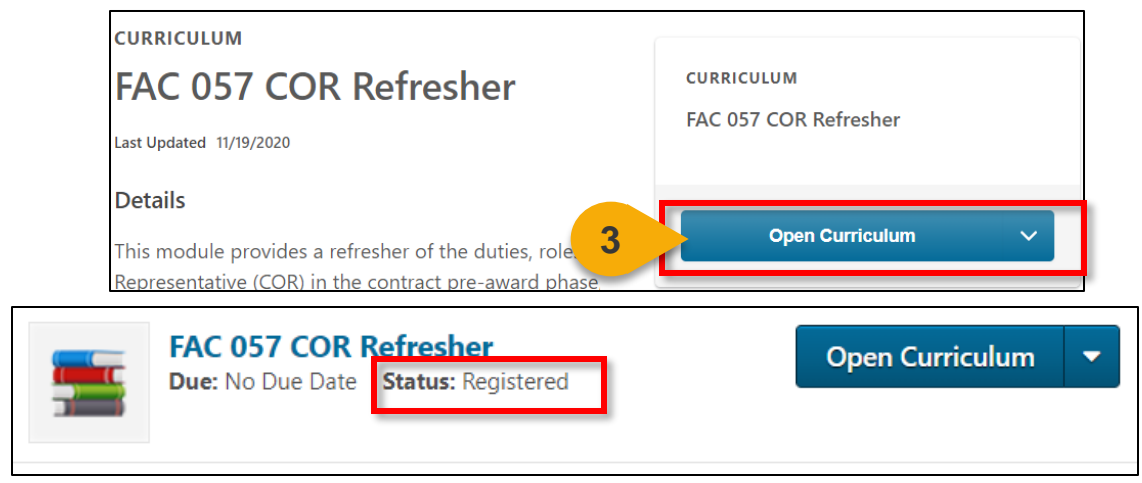


Global Search

Training results

-  **FAC 068 Contract Types**
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00
Develop an understanding of the most common contract types and their basic characteristics as well as factors to consider when selecting and negotiating the contract type.
-  **FAC 057 COR Refresher**
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00
This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase, and the contract administration and management phase. Module 1 provides an overview of these elements, while Module 2 is an interactive, scenario-based exercise that allows the COR to apply im...

Step 3: Click the **Open Curriculum** button to register for the OLT. The course will then be added to your Transcript with a status of Registered.



CURRICULUM


FAC 057 COR Refresher

Last Updated 11/19/2020

Details

This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase

Open Curriculum ▼

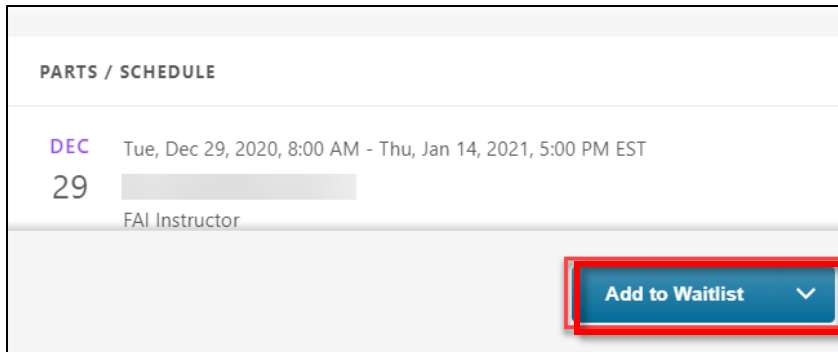
 **FAC 057 COR Refresher**
Due: No Due Date **Status: Registered** **Open Curriculum** ▼

Submit an Exception Request

When you want to submit an Exception Request for a course prerequisite...

You will submit an Exception Request when you would like to register for a Session that has a prerequisite requirement that you do not meet. If granted, this request will allow you attend the course without having the prerequisite on your Transcript.

Step 1: Select the Session you would like to join and click **Add to Waitlist** or **Request**.

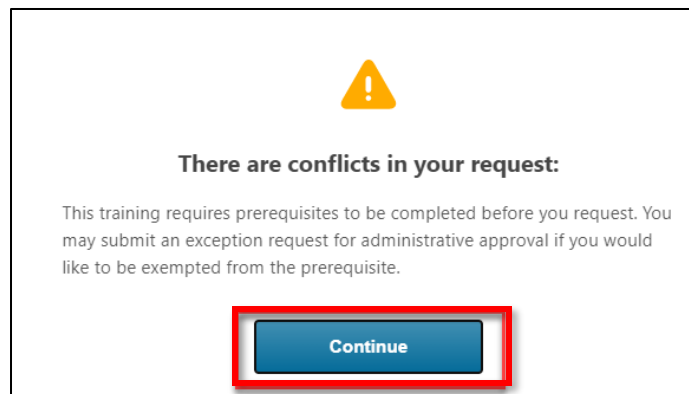


PARTS / SCHEDULE

DEC 29 Tue, Dec 29, 2020, 8:00 AM - Thu, Jan 14, 2021, 5:00 PM EST
FAI Instructor

Add to Waitlist

Step 2: A Warning will pop-up. Select **Continue** to submit an Exception Request.

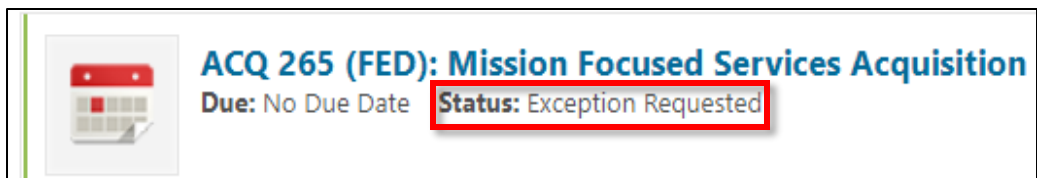


There are conflicts in your request:

This training requires prerequisites to be completed before you request. You may submit an exception request for administrative approval if you would like to be exempted from the prerequisite.

Continue

Step 3: The status for the session will change to **Exception Requested** on your transcript.



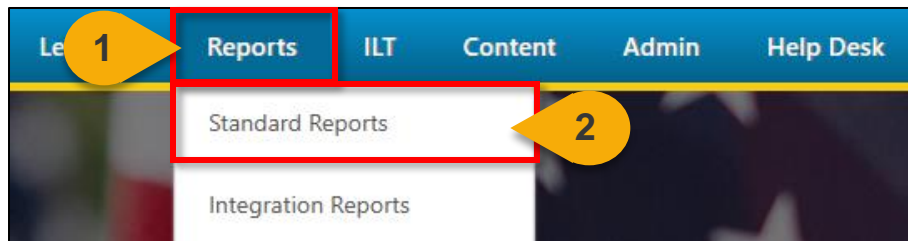
ACQ 265 (FED): Mission Focused Services Acquisition

Due: No Due Date Status: Exception Requested

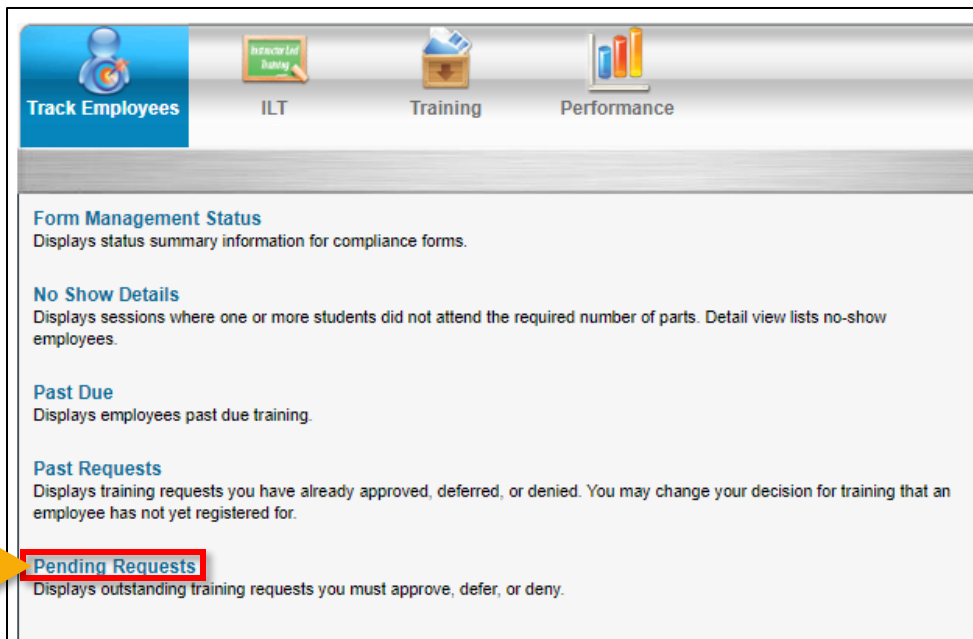
Approve Training Requests

When you want to approve training...

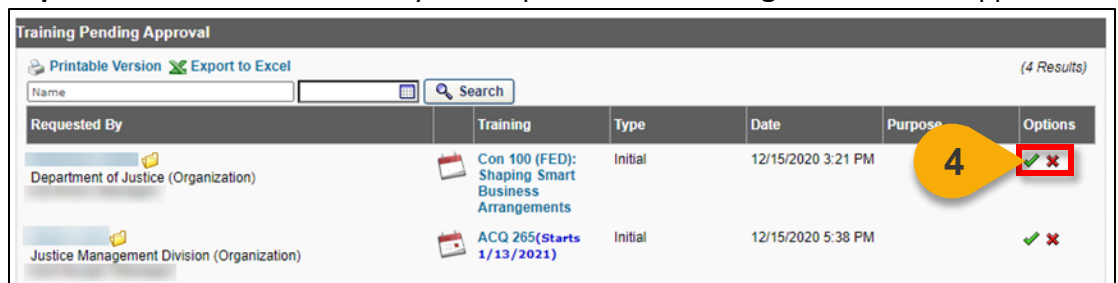
Steps 1 & 2: Navigate to the **Reports** tab and then click on **Standard Reports**.



Step 3: Click on the link for the **Pending Requests** report to view training requests.



Step 4: Click on the **red X** to deny the request. Click on the **green check** to approve.



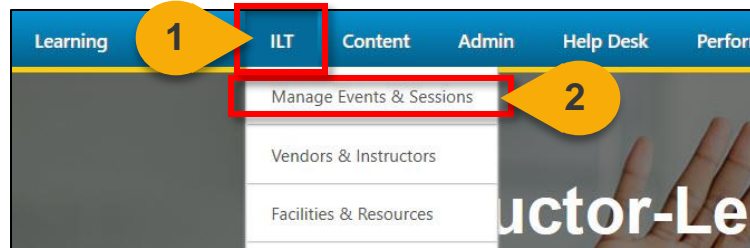
Sessions and Rosters



Create Event

When you want to create a new Event...

Steps 1 & 2: Hover over the ILT tab, then select **Manage Events & Sessions**.



Step 3: Select **Create New Event**.

A screenshot of the 'Manage Events & Sessions' page. The page title is 'Manage Events & Sessions'. Below the title is a description: 'Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule new sessions.' There are three tabs: 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below the tabs is a 'Search All Events' section. It contains a search bar with the text 'Search for events or sessions' and two radio buttons: 'Search for all Events' (selected) and 'Search for all Sessions'. Below the search bar are three input fields: 'Event Name', 'Subject', and 'Vendor'. There is also a dropdown menu for 'All Languages'. Below these fields is a section titled 'or search for sessions directly by using locator number' with a 'Locator Number' input field and a 'View Active Events Only' checkbox. A 'Search' button is located at the bottom right of the search section. Below the search section is a 'Legend' section with five icons and labels: 'Edit Evaluation', 'View Evaluation Report', 'Edit Event', 'Copy Event', and 'View Sessions'. At the bottom left of the page, there is a blue bar with the text 'Create New Event' highlighted with a red box and a yellow callout bubble with the number '3'.

Note: When creating a session, the first step is to define a part for the session. *See Create Session - Parts Schedule - Define Part.*

Create Event (Cont.1)

Step 4: In the Properties tab, add the **Event Name**. The Event Name is the name of the course, such as ACQ 265 (FED): Mission Focused Services Acquisition.

The screenshot shows the 'Add New Event' form with the 'Properties' tab selected. The 'Event Name' field is highlighted with a red box, and a yellow callout bubble with the number 4 points to it. The form includes fields for 'Event Name', 'Event Number', 'Vendor', 'Training Hours' (with 'hour(s)' and 'minute(s)' sub-fields), 'Object ID' (013fdd1a-5b9d-403a-9a61-854f918f6aaf), and a 'Description' field with a rich text editor toolbar.

Step 5: Add the **Event Number**. The Event number can be similar to the Event name, for example, ACQ265(FED).

The screenshot shows the 'Add New Event' form with the 'Properties' tab selected. The 'Event Number' field is highlighted with a red box, and a yellow callout bubble with the number 5 points to it. The form includes fields for 'Event Name', 'Event Number', 'Vendor', 'Training Hours' (with 'hour(s)' and 'minute(s)' sub-fields), 'Object ID' (013fdd1a-5b9d-403a-9a61-854f918f6aaf), and a 'Description' field with a rich text editor toolbar.

Step 6: Select a **Vendor** for the Event.

The screenshot shows the 'Add New Event' form with the 'Properties' tab selected. The 'Vendor' field is highlighted with a red box, and a yellow callout bubble with the number 6 points to it. The form includes fields for 'Event Name', 'Event Number', 'Vendor', 'Training Hours' (with 'hour(s)' and 'minute(s)' sub-fields), 'Object ID' (013fdd1a-5b9d-403a-9a61-854f918f6aaf), and a 'Description' field with a rich text editor toolbar.

Create Event (Cont.2)

Step 7: Enter **additional information** as applicable. As a Federal Organizations Registrar, you will likely enter: Training Hours, Description, Objectives, FAI Course Code, Continuous Education Units, Event Information, and Target Attendees.

7

Vendor:

Training Hours: hour(s) minute(s)

Object ID: dcb3133c-7bd9-4373-8958-acbf94d59e7b

Description:

B **I** **U** **Link** **Table**

Design HTML

Resources: [Add Attachment](#)

No attachments have been uploaded for this Event

Objectives:

B **I** **U** **Link** **Table**

Design HTML

Available Languages: English (US) ☐ Check all the languages that the content in this Event contains.

Default Language: English (US) : This is the language in which the event is shown to the user if this event's information is not localized in their language.

FAI Course Code:

Continuous Education Units:

Continuous Learning Points:

Event Information:

Predecessor Courses:

Target Attendees:

Resources: [Add Material](#)

Type	Title
------	-------

Step 8: Subjects is a required field. Select the **Add Subject** link.

8

Subjects: [Add Subject](#)

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: ☐ Active ☐ Allow Users To Attend Multiple Sessions ☐ Allow interest tracking

Ability to select sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

☐ End Users ☐ Admins and Managers

Keywords:

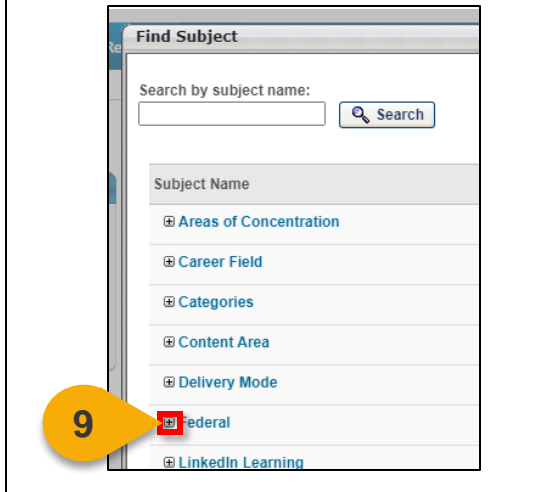
Training Contact:

Created By:

Last Modified By:

Create Event (Cont.3)

Step 9: Use the **gray +** to drill into Federal Subjects.



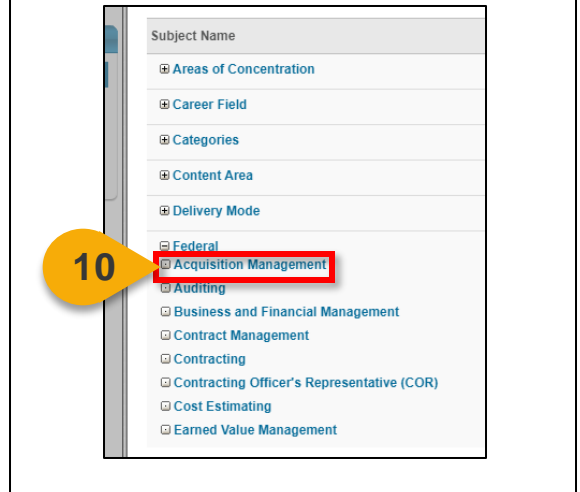
Find Subject

Search by subject name:

Subject Name

- Areas of Concentration
- Career Field
- Categories
- Content Area
- Delivery Mode
- Federal**
- LinkedIn Learning

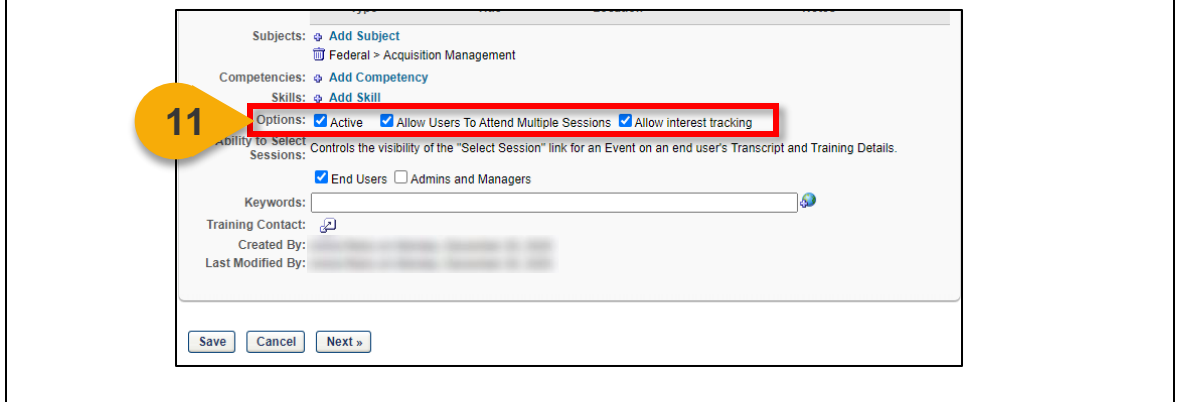
Step 10: Use the **blue link** to select the applicable Subject(s).



Subject Name

- Areas of Concentration
- Career Field
- Categories
- Content Area
- Delivery Mode
- Federal**
 - Acquisition Management**
 - Auditing
 - Business and Financial Management
 - Contract Management
 - Contracting
 - Contracting Officer's Representative (COR)
 - Cost Estimating
 - Earned Value Management

Step 11: The Subject will be added to the Event on the Event page. Ensure **Active** and **Allow Interest Tracking** are checked. Check **Allow Users To Attend Multiple Sessions** only if the Event is for Brown Bags.



Subjects:
Federal > Acquisition Management

Competencies:

Skills:

Options: ☒ Active ☒ Allow Users To Attend Multiple Sessions ☒ Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.
☒ End Users ☐ Admins and Managers

Keywords:

Training Contact:

Created By:

Last Modified By:

Create Event (Cont.4)

Step 12: Add **Keywords** if desired.

12

Subjects: [Add Subject](#)
Federal > Acquisition Management

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: ☒ Active ☒ Allow Users To Attend Multiple Sessions ☒ Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

☒ End Users ☐ Admins and Managers

Keywords:

Training Contact: [Add](#)

Created By: Amira Reiss on Monday, December 28, 2020
Last Modified By: Amira Reiss on Monday, December 28, 2020

[Save](#) [Cancel](#) [Next »](#)

Step 13: Add a **Training Contact** for this Event if desired.

13

Subjects: [Add Subject](#)
Federal > Acquisition Management

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: ☒ Active ☒ Allow Users To Attend Multiple Sessions ☒ Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

☒ End Users ☐ Admins and Managers

Keywords:

Training Contact:

Created By: [Add](#)

Last Modified By: [Add](#)

[Save](#) [Cancel](#) [Next »](#)

Step 14: Click **Next** to save this information and move to the Availability tab.

Subjects: [Add Subject](#)
Federal > Acquisition Management

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: ☒ Active ☒ Allow Users To Attend Multiple Sessions ☒ Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

☒ End Users ☐ Admins and Managers

Keywords:

Training Contact: [Add](#)

Created By: [Add](#)

Last Modified By: [Add](#)

[Save](#) [Cancel](#) [Next »](#)

14

Create Event (Cont.5)

Step 15: In the **Select Criteria** drop down, click **Organization**.

The screenshot shows the 'Availability' section of a form. At the top, there is a checkbox labeled 'Copy Availability To New Sessions' which is checked. Below this is a grey bar labeled 'AVAILABILITY'. Underneath, there is a 'Select Criteria' dropdown menu. The dropdown is open, showing a list of options: 'Select Criteria', 'All Users', 'Organization' (highlighted with a red box and a yellow callout bubble labeled '15'), 'Position', 'Grade', 'Location', 'Group', and 'Users'. To the right of the dropdown, there are four tabs: 'INCLUDE SUBORDINATES', 'PRE-APPROVED', and 'REGISTER UPON APPROVAL'.

Step 16: Click the **pop out** that appears next to the field.

The screenshot shows the 'Availability' section. The 'Copy Availability To New Sessions' checkbox is checked. Below the 'AVAILABILITY' bar, the 'Organization' field is selected. A red box highlights a small pop-out icon (a square with a circle and an arrow) next to the field name. A yellow callout bubble labeled '16' points to this icon. Below the field, there are buttons for 'REMOVE' and 'CRITERIA'.

Step 17: Click the **gray +** next to DAU Registrar to drill down within the Organizations.

The screenshot shows a 'Hierarchy' table. The table has two columns: 'ADD' and 'TITLE'. The rows are: 'BAH', 'Client Admin Organization', 'Cornerstone Administration Organization', 'DAU Registrar' (highlighted with a red box and a yellow callout bubble labeled '17'), and 'Non-Authenticated'. Each row has a small gray plus icon in the 'ADD' column.

Step 18: Click the **blue +** next to Federal Organizations to make this event open to all Users within the Federal Organizations hierarchy or continue to drill down. Note: We will be able to set more restrictive availability when creating sessions.

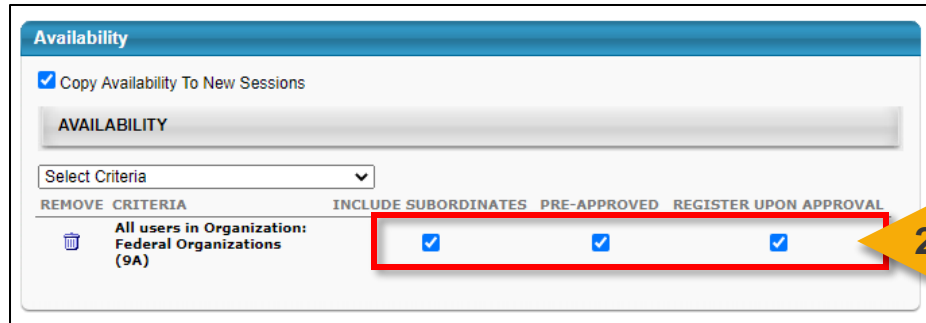
The screenshot shows a 'Hierarchy' table. The table has two columns: 'ADD' and 'TITLE'. The rows are: '4TH ESTATE', 'AIR FORCE', 'ARMY', 'Defense Security Cooperation Agency (DSCA)', 'Federal Organizations' (highlighted with a red box and a yellow callout bubble labeled '18'), 'FOREIGN MILITARY', 'INDUSTRY', and 'NAVY'. Each row has a small blue plus icon in the 'ADD' column.

Step 19: Click the **Done** to add the availability.

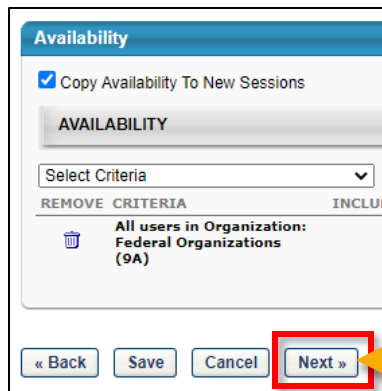
The screenshot shows the 'Selected Organization' section. At the top, it says 'Top Node : DAU Registrar'. Below this is a table with columns 'REMOVE', 'TITLE', and 'ID'. The rows are: 'Federal Organizations' (ID: 9A) and '(8 Results)'. Below this is a 'Hierarchy' table with columns 'ADD', 'TITLE', and 'ID'. The rows are: '4TH ESTATE' (KA), 'AIR FORCE' (UE), 'ARMY' (H4), 'Defense Security Cooperation Agency (DSCA)' (KA6Z), 'Federal Organizations' (9A), 'FOREIGN MILITARY' (ZA), 'INDUSTRY' (00), and 'NAVY' (UM). At the bottom right, there are two buttons: 'Close' and 'Done' (highlighted with a red box and a yellow callout bubble labeled '19').

Create Event (Cont.6)

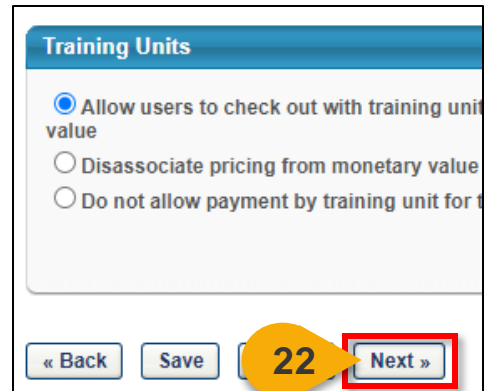
Step 20: Check the **Include Subordinates, Pre-Approved, and Register Upon Approval** boxes. These options will ensure that all Federal Organizations Users will see the Event, that users will not go through the workflow unless dictated in the Session, and that users will not need to register themselves after they are approved.



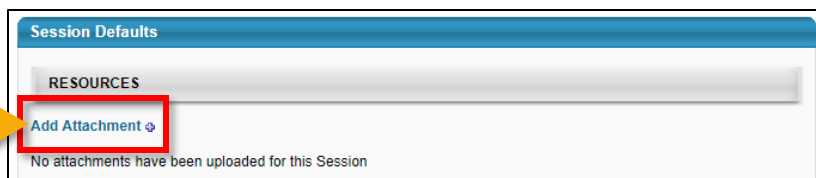
Step 21: Click **Next** to save the availability and move to the Training Units tab.



Step 22: You will not use the Training Units tab. Click **Next** to advance to the Session Defaults tab.



Step 23: Any information you enter in the Session Defaults will appear for all Sessions you create. You can set this information here if it is standard for as Sessions or set this information when creating Sessions. You can still edit the information in the Session. In the **Resources** section, add any attachments, if applicable.



Create Event (Cont.7)

Step 24: In the Registration section, set the **Registration Deadline**. Is the amount of time before the Event you wish to allow no more Users to register.

REGISTRATION

Registration [] Day(s) [v] Before [v] first part of session
Deadline: starts. (Request and Register)
Before: (Session Start Date and Time – Timing Selected
Above = Registration Deadline)
After: (Session Start Date and Time + Timing Selected Above
= Registration Deadline)

Minimum
Registration: [] *

Maximum
Registration: [] *

24

Step 25: Set the **Minimum Registration** and **Maximum Registration** for Sessions in this Event. These fields are required but can be updated at the Session level.

REGISTRATION

Registration [] Day(s) [v] Before [v] first part of session
Deadline: starts. (Request and Register)
Before: (Session Start Date and Time – Timing Selected
Above = Registration Deadline)
After: (Session Start Date and Time + Timing Selected Above
= Registration Deadline)

Minimum
Registration: [] *

Maximum
Registration: [] *

25

Step 26: If the same vendor is providing all instances of this training, enter this vendor in the **Delivered By** field.

Minimum
Registration: [] *

Maximum
Registration: [] *

Delivered
By: [] *

Payment
Received
Date: []

Payment []

26

Step 27: In the Enrollment section, select **None**. You will set this when creating Sessions.

ENROLLMENT

Once users are registered in this session, some enrollment options may not be available.

☒ None

☐ Place Enrollment Restrictions

☐ Manage Reservations and Restrictions

27

Step 28: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one user at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit users to one waitlist per event** are all checked.

WAITLIST

Waitlist: ☒ Allow waitlist for sessions in this event
☒ Allow Auto-Management of Waitlist
☒ Grant waitlist opening to one user at a time based on priority
☐ Grant opening to all waitlisted users at once for first come first served registration
☒ Auto-Register User upon Granting Waitlist
☒ Limit users to one waitlist per event

Waitlist Students have [0] days and [0] hours to
Deadlines: register for a class after a waitlist opening is granted
Waitlist expires [0] days and [23] hours before
session start date

28

Step 29: Set the **Waitlist Expiration** for this Event, if applicable.

WAITLIST

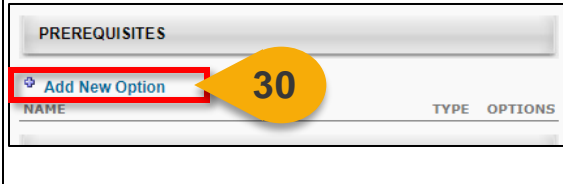
Waitlist: ☒ Allow waitlist for sessions in this event
☒ Allow Auto-Management of Waitlist
☒ Grant waitlist opening to one user at a time based on priority
☐ Grant opening to all waitlisted users at once for first come first served registration
☒ Auto-Register User upon Granting Waitlist
☒ Limit users to one waitlist per event

Waitlist Students have [0] days and [0] hours to
Deadlines: register for a class after a waitlist opening is granted
Waitlist expires [0] days and [23] hours before
session start date

29

Create Event (Cont.8)

Step 30: Move to the Prerequisites section. Add Prerequisites if applicable by selecting Add New Option. The prerequisite must be in CSOD to be selected.

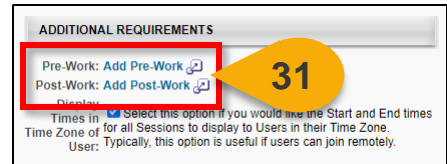


PREREQUISITES

[Add New Option](#)

NAME	TYPE	OPTIONS
------	------	---------

Step 31: Move to the Additional Requirements section. **Add Pre-Work** or **Add Post-Work** if applicable.



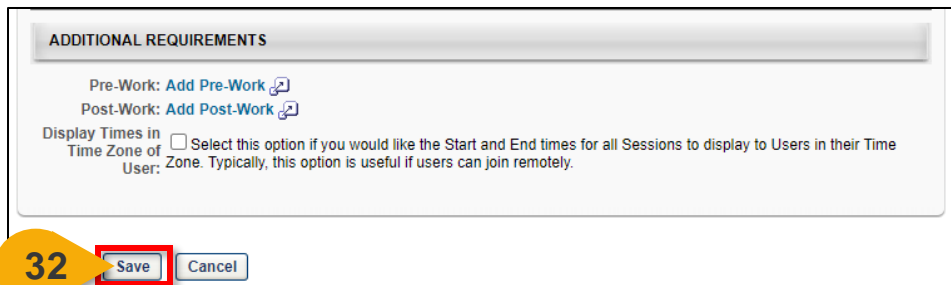
ADDITIONAL REQUIREMENTS

Pre-Work: [Add Pre-Work](#)

Post-Work: [Add Post-Work](#)

Display Times in Time Zone of User: ☐ Select this option if you would like the Start and End times for all Sessions to display to Users in their Time Zone. Typically, this option is useful if users can join remotely.

Step 32: Click **Save** to save this Event.



ADDITIONAL REQUIREMENTS

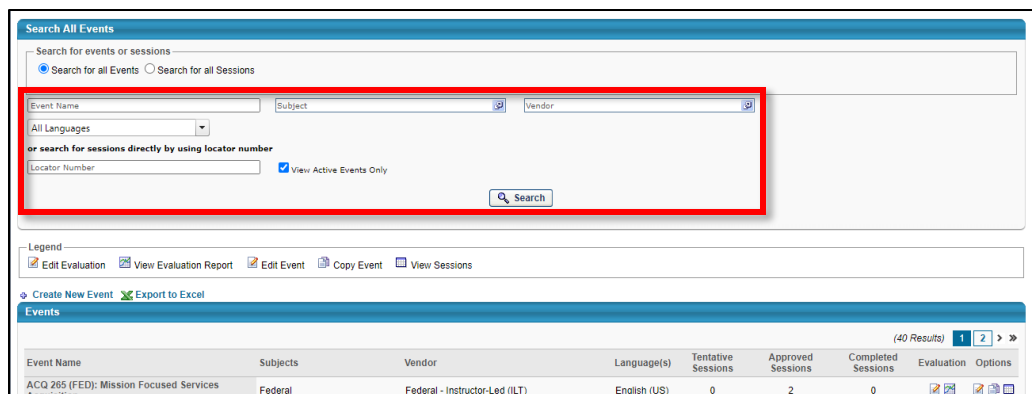
Pre-Work: [Add Pre-Work](#)

Post-Work: [Add Post-Work](#)

Display Times in Time Zone of User: ☐ Select this option if you would like the Start and End times for all Sessions to display to Users in their Time Zone. Typically, this option is useful if users can join remotely.

[Save](#) [Cancel](#)

You will be returned to your Manage Events & Sessions page. From here, you can search for and view the Event you created.



Search All Events

Search for events or sessions

☒ Search for all Events ☐ Search for all Sessions

Event Name: Subject: Vendor:

All Languages:

or search for sessions directly by using locator number

Locator Number: ☒ View Active Events Only

[Search](#)

Legend

[Edit Evaluation](#) [View Evaluation Report](#) [Edit Event](#) [Copy Event](#) [View Sessions](#)

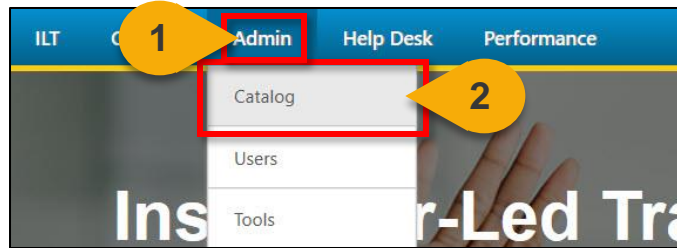
[Create New Event](#) [Export to Excel](#)

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
ACQ 265 (FED): Mission Focused Services Acquisition	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0	View	Edit

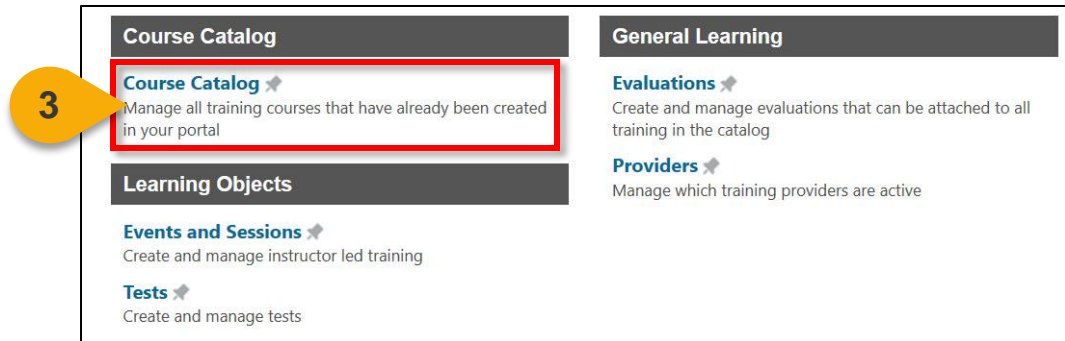
Edit Event

When you want to edit an Event...

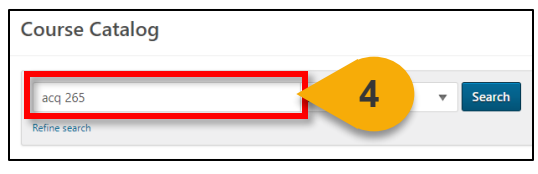
Steps 1 & 2: Hover over the **Admin** tab, then select **Catalog**.



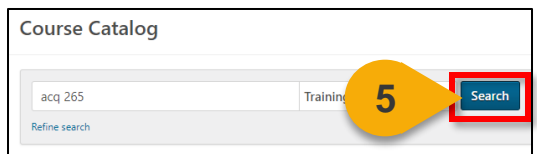
Step 3: Click on **Course Catalog** under Course Catalog heading.





Step 4: Enter the name of the Event you are looking for into the **search** field.



Step 5: Click **Search**.





Step 6: Click the **arrow** in the Actions column to the right of the Event name.

✓	Title	Provider	Version	Language	Created Date	Modified Date	Actions
✓	 ACQ 265 (FED): Mission Focused Services Acquisition	Federal - Instructor-Led (ILT)	N/A	English (US)	11/17/2020		

Edit Event (Cont.1)

Step 7: Choose **Edit** from the dropdown menu.

<input checked="" type="checkbox"/>	Title	Provider	Version	Language	Created Date	Modified Date	Actions
<input checked="" type="checkbox"/>	 ACQ 265 (FED): Mission Focused Services Acquisition	Federal - Instructor-Led (ILT)	N/A	English (US)	11/17/2020	12/18/2020	<div><div>7</div><div>Edit View as User</div></div>
<input checked="" type="checkbox"/>	 DHS: ACQ 265	Federal - Homeland Security Acquisition Institute (HSAI)	N/A	English (US)	9/17/2020	12/18/2020	

Step 8: Use the **tabs** along the top of the page to edit different elements of this Event.

Edit ACQ 265 (FED): Mission Focused Services Acquisition

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

General Subjects Skills Competencies Acknowledgement Availability Emails Recommendations Training **8**

Edit Training

Title: ACQ 265 (FED): Mission Focused Services Acquisition

Provider: Federal - Instructor-Led (ILT)

Type: Event

Version: 1.0

Step 9: To edit the emails that are sent for this Event, click the **Emails** tab.

Edit ACQ 265 (FED): Mission Focused Services Acquisition

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

General Subjects Skills Competencies Acknowledgement **Emails** Recommendations Training **9**

Edit Training

Title: ACQ 265 (FED): Mission Focused Services Acquisition

Step 10: Select **System Defaults** to send the default emails authored for all Federal Organizations.

10

Select Email Configuration

☒ **System Defaults** - Use default emails based on settings and availability from email administration area. All emails related to this training will apply to emails that have not yet been queued.

☐ **Custom Emails** - All emails related to this learning object may be customized. By default, triggers related to the selected email actions sent related to this training will be sent based on the custom templates below. Changes made to the custom templates will apply to all training.

☐ **No Emails** - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option will not be sent.

Edit Event (Cont.2)

Step 11a: Select **Custom Emails** to edit the emails sent for this Event.

General Subjects

Select Email Configuration

☐ System Defaults - Use default emails based on settings a administration area will send emails that have not yet b

☒ Custom Emails - Emails sent related to this learning object will be sent based on

☐ No Emails - No emails will be sent in association with th

Step 11b: A panel will open in the bottom portion of the page. Click the **gray x** next to the email you wish to edit.

Email Administration

ACTION	DESCRIPTION	ACTION
	Request Webcast	Instructor Training
		Training

Step 11c: Click **Edit** in the Option column to edit the email.

ACTION	ACTION TYPE	DESCRIPTION	ADD EMAIL				
Request ILT Session	Instructor Led Training	User submits request for an ILT session					
EMAIL	CATEGORY	RECIPIENTS	AVAILABILITY	CUSTOM/ DEFAULT	LANGUAGE	ACTIVE	OPTIONS
DSCU Request ILT Session	Confirmation	Next approver if training request is pending	All users in Organization: Defense Security Cooperation Agency (DSCA) (include Subordinates)	D	English (US), All Languages		
ILT Session Has Been Requested	Notification	Next approver if training request is pending	All users in Organization: Federal Organizations (include Subordinates)	D	English (US), All Languages		

Step 11d: Make required edits to the email.

Email Title: ILT Session Has Been Requested

From Address: noreply@dau.edu

Reply-To Address: noreply@dau.edu

Type: Notification

Language: English (US) ☒ Include users not using this language

Select users to receive this email.

Send To: User or Add

Cc: User or Add

Restrict the availability of this email to the following OUs:
The availability criteria that you select will only include employees who meet the following criteria: (C)

Availability: Select Criteria

All users in Organization: Federal Organizations (9A)

are replaced with the corresponding values when emails are sent.

Tags: Display a list of tags that can be used within the subject and body of the e-mail

Subject: You Received An ILT Request From TRAINEE.FIRST.NAME TRAINEE.LAST.NAME

Message: ☒ HTML ☐ Plain Text

APPROVER.FIRST.NAME APPROVER.LAST.NAME, TRAINEE.FIRST.NAME TRAINEE.LAST.NAME has submitted an ILT request for

Step 11e: Click **Save Email** to save the email and return to the Email tab. Click **Cancel Email** to return to the Email tab without saving.

Design HTML Preview

Save Email Cancel Email

Cancel Save

Edit Event (Cont.3)

Step 12: To turn off Emails for this Event, select **No Emails**.

General Subjects Skills

Select Email Configuration

☐ System Defaults - Use default emails based on settings and available administration area will apply to emails that have not yet been queued.

☐ Custom Emails - All emails related to this learning object may be sent in association with this training.

☒ No Emails - No emails will be sent in association with this training.

Cancel Save

Step 13: Click **Save** or navigate to another tab to save your email choices.

General Subjects Skills

Select Email Configuration

☐ System Defaults - Use default emails based on settings and available administration area will apply to emails that have not yet been queued.

☐ Custom Emails - All emails related to this learning object may be sent in association with this training.

☒ No Emails - No emails will be sent in association with this training.

Cancel Save

Step 14: To update the Evaluation used for this Event, click the **Evaluations** tab.

Ability Emails Recommendations Training Evaluations

custom evaluation by editing the default. If you later decide to replace a custom evaluation with the default then

Step 15: Check the box in the **Active** column to activate Level 1 Evaluation for this Event.

EVALUATION	ACTIVE	REQUIRED	INCLUDE PRE-TRAINING	PREVIEW	
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A		0d.11

Step 16: Check the box in the **Required** column to require Users complete Evaluation for this Event.

EVALUATION	ACTIVE	REQUIRED	INCLUDE PRE-TRAINING	PREVIEW	
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A		0d.11

Step 17: Click the **pop out** in the Options column to select the Evaluation for this Event.

REQUIRED	INCLUDE PRE-TRAINING	PREVIEW	TITLE	OPTIONS
<input checked="" type="checkbox"/>	N/A		0d.11T/V/ILT v4 - Updated	

Edit Event (Cont.4)

Step 18: Click the **blue +** next to the Evaluation you wish to use for this Event.

18

	End of Course Evaluation OLT	English (US)	9/24/2018 10:15:57 AM	9/24/2018 10:16:38 AM
	Federal ILT Evaluation (FY21)	English (US)	9/25/2020 5:00:12 PM	11/3/2020 12:30:05 PM
	Federal OLT Evaluation (FY21)	English (US)	9/25/2020 2:30:00 PM	11/3/2020 12:30:55 PM
	FPD End of Course Evaluation (ILT/VILT) 2	English (US)	10/30/2018 1:10:19 PM	12/19/2018 3:16:26 PM

You will be returned to the Evaluations tab. You can view the Evaluation you chose under the **Title** column.

INCLUDE PRE-TRAINING	PREVIEW	TITLE	TYPE	OPTIONS
N/A		Federal ILT Evaluation (FY21)	Custom	

Step 19: Click **Save** or navigate to another tab to save these changes.

Evaluations

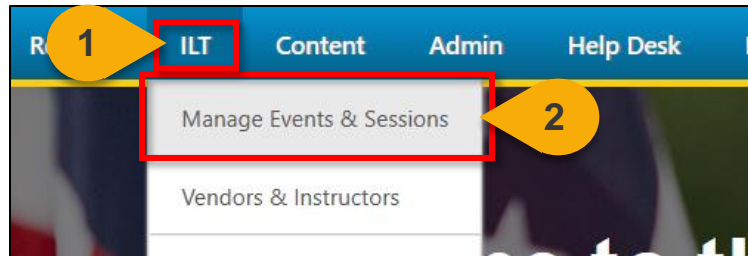
EVALUATION	ACTIVE
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>

19

Create Sessions

When you want to create a Session...

Steps 1 & 2: Hover over the **ILT** tab, then select **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.

A screenshot of the 'Manage Events & Sessions' page. The 'Search All Events' section is active. The 'Event Name' search field is highlighted with a red box and a yellow callout bubble with the number '3'. Below the search field, there are radio buttons for 'Search for all Events' (selected) and 'Search for all Sessions'. There is also a 'Locator Number' field and a 'View Active Events Only' checkbox. A 'Search' button is at the bottom right.

Step 4: Click **Search** or hit **Enter**.

A screenshot of the 'Manage Events & Sessions' page, similar to the previous one. The 'Search' button is highlighted with a red box and a yellow callout bubble with the number '4'. The 'Event Name' field now contains the text 'All Languages'.

Create Sessions (Cont.1)

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.

Subjects Vendor		Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click **Create New Session**.

6

Create New Session

Sessions

Day	Start Date	End Date	Session ID
Friday			
Friday			

Step 7: In the Parts Schedule tab, enter the Part **Name**. The Part Name should include the schoolhouse providing the Session, the course number, the fiscal year, and the Session number. Example: DHS: ACQ 265-2021-01.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session

Parts Schedule

Details

Availability

Emails

Edit Part

Name:

Description:

Location:

Select Room Layout

Add Resource

Add Instructor

Step 8: Enter a **Description** for this Session (optional).

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session

Parts Schedule

Details

Availability

Emails

Edit Part

Name:

Description:

Location:

Select Room Layout

Add Resource

Add Instructor

Create Sessions (Cont.2)


Step 9: Choose a Location for this Session by clicking the **pop out** next to the Location field.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session Edit Part

Name:


Description:

Location: 




Select Room Layout Add Resource Add Instructor

Step 10: Click the **gray +** next to a Location to drill down to the Location for this Session.

Hierarchy

ADD	TITLE
	Federal Organizations - Locations

Step 11: Click the **blue +** next to a Location to select it.

	FAI: VIENNA, VA
	FAI: WASHINGTON, DC
	Instructor-Led Training (FAI)

Step 12: The Facility Details window will appear. Click **Done** to add this Location to the Session.

Facility Details

Facility: Virtual Instructor-Led Training (FAI)

Confirmation Required: ☐ Require the location to be confirmed before the session is approved*

Notes:

(*If the "Confirmation Required" checkbox is not checked, the session will be approved even if the facility is not available)


Step 13: Click **Add Instructor** to assign an Instructor to this Session.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session Edit Part

Name:

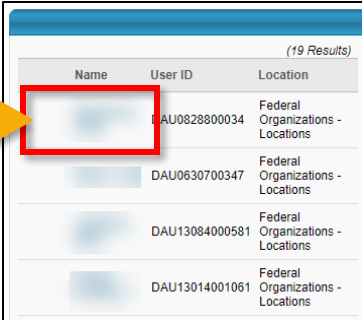
Description:

Location: 

Select Room Layout Add Resource

Create Sessions (Cont.3)

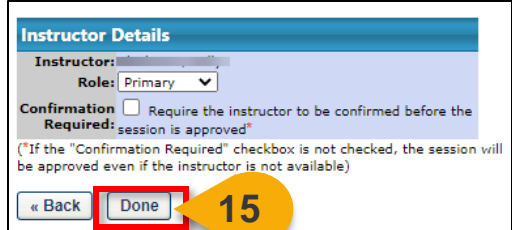
Step 14: Click the **Name** of the User you would like to make the Instructor of this Session.



(19 Results)

Name	User ID	Location
[Redacted]	DAU0828800034	Federal Organizations - Locations
[Redacted]	DAU0630700347	Federal Organizations - Locations
[Redacted]	DAU13084000581	Federal Organizations - Locations
[Redacted]	DAU13014001061	Federal Organizations - Locations

Step 15: In the Instructor Details window, click **Done** to add this Instructor to the Session.



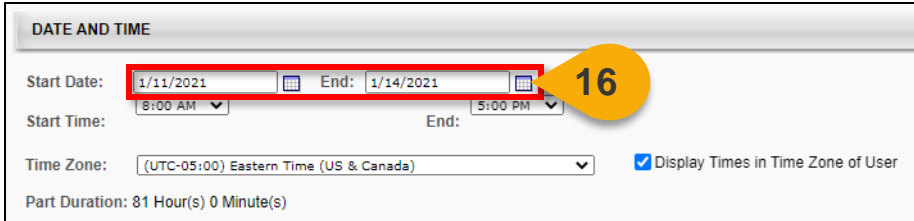
Instructor Details

Instructor: [Redacted]
Role: Primary

Confirmation Required: ☐ Require the instructor to be confirmed before the session is approved*
(*If the "Confirmation Required" checkbox is not checked, the session will be approved even if the instructor is not available)

« Back Done

Step 16: In the Date and Time section, enter a **Start Date** and **End Date** for this Session.



DATE AND TIME

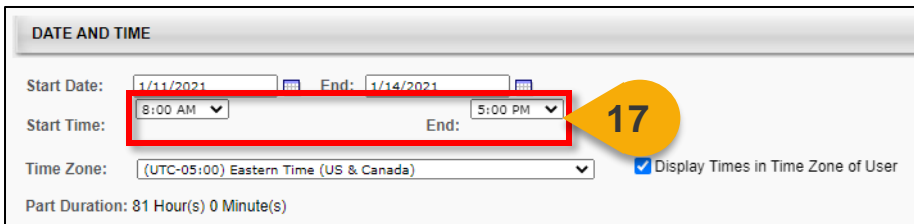
Start Date: 1/11/2021 End: 1/14/2021

Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) ☒ Display Times in Time Zone of User

Part Duration: 81 Hour(s) 0 Minute(s)

Step 17: Enter a **Start Time** and **End Time**.



DATE AND TIME

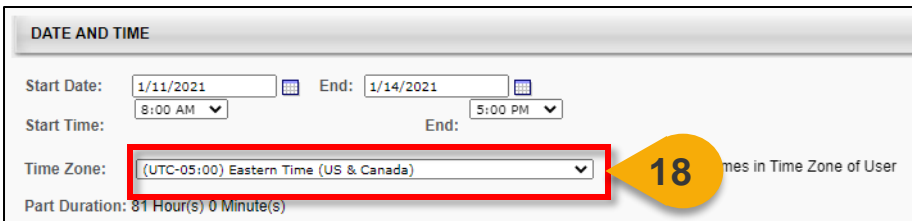
Start Date: 1/11/2021 End: 1/14/2021

Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) ☒ Display Times in Time Zone of User

Part Duration: 81 Hour(s) 0 Minute(s)

Step 18: Select the **Time Zone** for the Session.



DATE AND TIME

Start Date: 1/11/2021 End: 1/14/2021

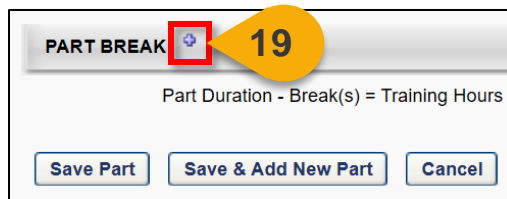
Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) ☒ Display Times in Time Zone of User

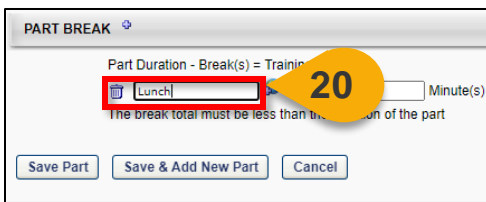
Part Duration: 81 Hour(s) 0 Minute(s)

Create Sessions (Cont.4)

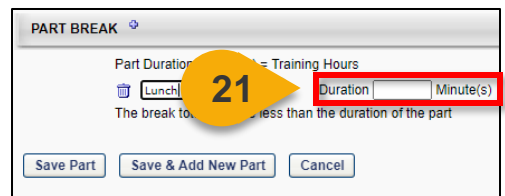
Step 19: If you would like CSOD to keep track of the amount of time students are actually in the Session, you can create Part Breaks. For example, if a part has a Start Time of 8:00 AM, an End Time of 5:00 PM, and a Part Break of 30 minutes, then the total training hours for the part is 8.5 hours. Part Breaks are not required and will not impact CLPs. To add a Part Break, click the **blue +** next to Part Break.



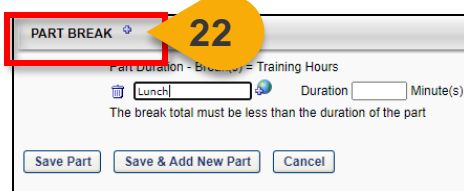
Step 20: Label the **Part Break**.



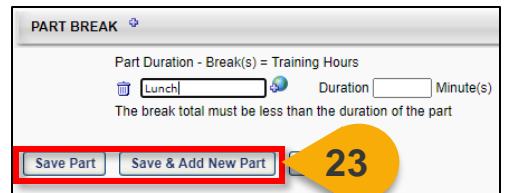
Step 21: Set the **Part Duration** in minutes.



Step 22: Add additional Part Breaks as needed by clicking the **blue +**. (See note below on adding parts)



Step 23: Click **Save & Add New Part** to create another Part for this Session (this functionality is frequently used for multi-day Sessions) or click **Save Part** to save this information.



If the session duration is more than a day, or if separate sessions within the same day are required, add the session parts by clicking the Add Part link on the Parts Schedule page. See [Create Session – Parts](#) on CSOD's Online Help for more information.

Create Sessions (Cont.5)

Step 24: You will now see a Summary of the Part information for this Session. Click the **Details** tab in the left-hand menu.

Step 25: The Session will inherit any defaults set at the Event level. You may change these values if required. Enter the Part Name you chose into the **Session ID** field.

Step 26: If this Session is offered by an external training vendor, enter that Vendor into the **Delivered By** field.

Step 27: Enter **Session Information**. Session information is any additional information you'd like Users to have about this Session.

Step 28: Enter the correct number of **Continuous Learning Points (CLPs)** for this Session.

Create Sessions (Cont.6)

Step 29: Choose a **Training Contact**. The Registrar or Student Services member creating the Session will be listed as default.

Target Attendees:

Training Contact: 

29


RESOURCES

Add Attachment 


No attachments have been uploaded for this Session

Step 30: If there are resources Users need prior to the Session, add them to the Resources section by clicking the **blue +** next to Add Attachment.

Target Attendees:

Training Contact: 

RESOURCES

Add Attachment 

30

No attachments have been uploaded for this Session

Step 31: In the Registration section, enter the **Attendance** requirements. This field will dictate how many parts users must attend to get credit for the course.

REGISTRATION

Attendance: 1 of 1 parts must be marked as attended for a session to be marked completed in the user's transcript

31

Registration Deadline: Register

Before: (Session Start Date and Time - Timing Selected Above = Registration Deadline)

After: (Session Start Date and Time + Timing Selected Above = Registration Deadline)

Minimum Registration: 0

Maximum Registration: 15

Step 32: If applicable, set the **Registration Deadline** by indicating at which point Users can no longer Register or Request the Session.

REGISTRATION

Attendance: 1 of 1 parts must be marked as attended for a session to be marked completed in the user's transcript

Registration Deadline: Register

32

Before: (Session Start Date and Time - Timing Selected Above = Registration Deadline)

After: (Session Start Date and Time + Timing Selected Above = Registration Deadline)

Minimum Registration: 0

Maximum Registration: 15

Step 33: Edit the **Minimum Registration** and **Maximum Registration** fields if these values are different than those entered for the Event.

Minimum Registration: 0

Maximum Registration: 15

33

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Step 34: Use the Enrollment Reservations and Restrictions section to send all users outside your schoolhouse to the waitlist. Select **Manage Reservations and Restrictions**.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions:

☐ None

☐ Place Enrollment Restrictions

☒ Manage Reservations and Restrictions

34

Create Sessions (Cont.7)

Step 35: A drop-down menu will appear. Choose **Organization**.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions:

☐ None

☐ Place Enrollment Restrictions

☒ Manage Reservations and Restrictions

None selected

None selected

Organization

Maximum Seats Allowed

Step 36: Click the **pop out** next to Organization to view the list of Organizations.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions:

☐ None

☐ Place Enrollment Restrictions

☒ Manage Reservations and Restrictions

Organization

Step 37: In the window that opens, click the **gray +** next to DAU Registrar to drill down to your Schoolhouse.

Title	ID
BAH	BAH
Client Admin Organization	CAO
Cornerstone Administration Organization	CSAO
DAU Registrar	XX
Non-Authenticated	NOAUTH

Step 38: Continue to drill down into the Federal Organizations. When you reach your Schoolhouse, click **Title** of the Organization.

Title	ID
⊕ ATRRS Federal Orgs	AFO
⊕ Department of Agriculture	9ALA
⊕ Department of Commerce	9ALB
⊕ Department of Education	9AL3
⊕ Department of Energy	9ALE

Step 39: Click **Add** at the bottom of the window.

Selected Organization

TITLE	ID
Department of Energy	9ALE

(30 Results) 1 2 3 >>

All > Defense Acquisition University (DAU) > DAU Registrar > Federal Organizations >

Title	ID	Parent
⊕ ATRRS Federal Orgs	AFO	Federal Organizations
⊕ Department of Agriculture	9ALA	Federal Organizations
⊕ Department of Commerce	9ALB	Federal Organizations
⊕ Department of Education	9AL3	Federal Organizations
⊕ Department of Energy	9ALE	Federal Organizations
⊕ Department of Health & Human Services	9ALL	Federal Organizations

Add

Create Sessions (Cont.8)

Step 40: The Organization will appear in the Enrollment Reservations and Restrictions section. Enter the value from Maximum Registration into **Reserved Seats** and **Maximum Seats Allowed**.

All Users outside your Organization will now be sent to the Waitlist and Users within your Organization will be automatically approved for a seat.

Manage Reservations and Restrictions

Organization: [dropdown]

Order	Criteria	Include Subordinates	Reserved Seats	Maximum Seats Allowed	Remove
0	All users in Organization Department of Energy	<input checked="" type="checkbox"/>	15	15	

Step 41: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one user at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit users to one waitlist per event** are all checked.

WAITLIST

Options:

- ☒ Allow waitlist for sessions in this event
- ☒ Allow Auto-Management of Waitlist
- ☒ Grant waitlist opening to one user at a time based on priority
- ☐ Grant opening to all waitlisted users at once for first come first served registration
- ☒ Auto-Register User upon Granting Waitlist
- ☒ Limit users to one waitlist per event

Waitlist Deadlines: Waitlist expires [0] days and [0] hours before session start date.

Step 42: If you would like the Waitlist to expire, enter the criteria for that expiration in the **Waitlist Deadlines** fields.

WAITLIST

Options:

- ☒ Allow waitlist for sessions in this event
- ☒ Allow Auto-Management of Waitlist
- ☒ Grant waitlist opening to one user at a time based on priority
- ☐ Grant opening to all waitlisted users at once for first come first served registration
- ☒ Auto-Register User upon Granting Waitlist
- ☒ Limit users to one waitlist per event

Waitlist Deadlines: Waitlist expires [0] days and [0] hours before session start date.

Create Sessions (Cont.9)

Step 43: If the Session has a prerequisite, click **Add New Option** in the Prerequisites section.

PREREQUISITES

Add New Option

NAME

TYPE OPTIONS

Step 44: If the Session has pre-work, click the **blue +** in the Pre-Work section to add it to the Session.

Add New Option

NAME

PRE-WORK **+**

POST-WORK **+**

Step 44: If the Session has post-work, click the **blue +** in the Post-Work section to add it to the Session.

Add New Option

NAME

PRE-WORK **+**

POST-WORK **+**

Step 46: At the bottom of the page, click **Next** to save these inputs and go to the Availability tab.

POST-WORK **+**

Next

Step 47: Availability dictates who can find the Session in their search results and request to enroll. The Session will inherit the availability of the Event, however, can make it more restrictive by only making the Session available to your Organization. Most Sessions will use the inherited availability. See the Create an Event task aid for more details on setting availability. Confirm the availability and click **Next**.

AVAILABILITY

Select Criteria

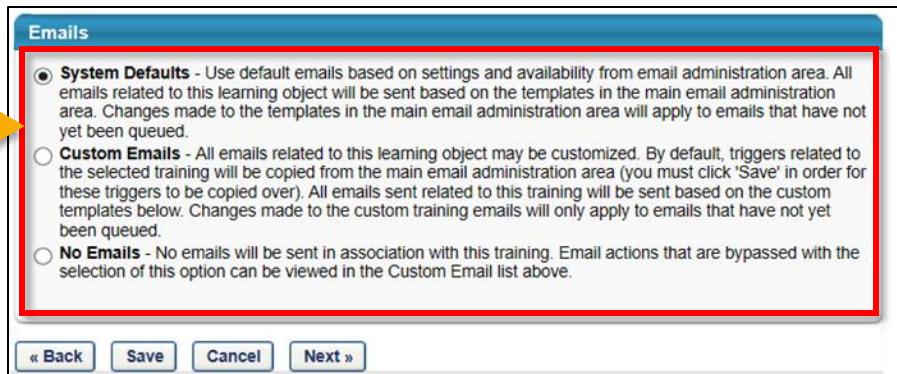
REMOVE CRITERIA

All users in Organization: Federal Organizations (9A)

Next

Create Sessions (Cont.10)

Step 48: In the Emails tab, select which emails you would like to fire for this Event. Choose **System Defaults** to use the emails that are sent for all Federal Organizations Sessions. Choose **Custom Emails** to customize the emails that are sent for the Session. See the Edit Events task aid for more information on how to create custom emails. Choose **No Emails** if you do not want any emails to be sent to Users for this Session.

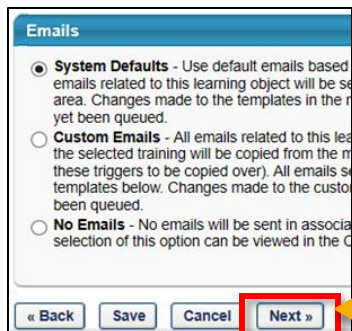


Emails

- ☒ **System Defaults** - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
- ☐ **Custom Emails** - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area (you must click 'Save' in order for these triggers to be copied over). All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.
- ☐ **No Emails** - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

« Back Save Cancel Next »

Step 49: Click **Next** to save these decisions and move to the next tab.

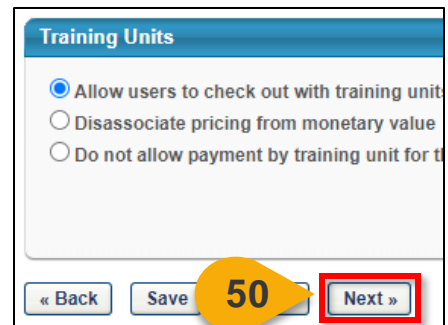


Emails

- ☒ **System Defaults** - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
- ☐ **Custom Emails** - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area (you must click 'Save' in order for these triggers to be copied over). All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.
- ☐ **No Emails** - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

« Back Save Cancel Next »

Step 50: You will not use the Training Units tab. Click **Next**.

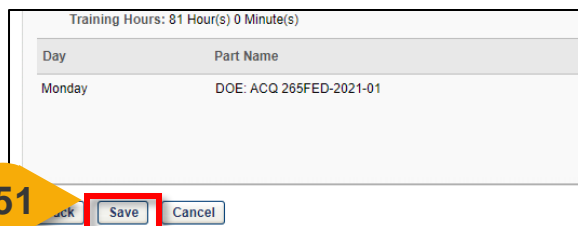


Training Units

- ☒ Allow users to check out with training unit
- ☐ Disassociate pricing from monetary value
- ☐ Do not allow payment by training unit for t

« Back Save Next »

Step 51: The Summary tab will allow you to review the decisions you made on the previous tabs. Confirm these settings and click **Save** to create the Session.



Training Hours: 81 Hour(s) 0 Minute(s)

Day	Part Name
Monday	DOE: ACQ 265FED-2021-01

« Back Save Cancel »

Create Sessions (Cont.11)

The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.

ACQ 265 (FED): Mission Focused Services Acquisition

Search

☒ Tentative ☒ Approved ☐ Completed ☐ Cancelled

Session ID: Locator Number: Start Date: to

Location: Instructor:

[Create New Session](#)

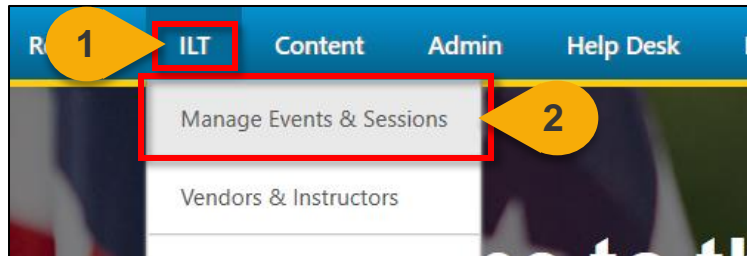
Sessions (2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15		Approved	

Edit Sessions

When you want to edit a Session you've created...

Steps 1 & 2: Hover over the **ILT** tab, and then select **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.

A screenshot of the 'Manage Events & Sessions' page. The 'Search All Events' section is visible. The 'Event Name' input field is highlighted with a red box and a yellow callout bubble with the number '3'. The page includes tabs for 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below the search fields, there is a checkbox for 'View Active Events Only' and a 'Search' button.

Step 4: Click **Search** or hit **Enter**.

A screenshot of the 'Manage Events & Sessions' page, showing the search form. The 'Search' button is highlighted with a red box and a yellow callout bubble with the number '4'. The form includes fields for 'Event Name', 'Subject', and 'Vendor', along with a dropdown for 'All Languages' and a checkbox for 'View Active Events Only'.

Edit Sessions (Cont.2)

Step 9: Click **Save** to save any changes.

Session

- Parts Schedule**
- Details
- Availability
- Emails
- Training Units
- Summary

Parts Schedule

Add Part
View Events Calendar
Export to Excel
Check Conflicts

Status	Day	Part Name	Starts	Ends	Training Hours	Location	Instructor	Options
	Monday	DOE: ACQ 265FED-2021-01	1/11/2021 8:00 AM EST	1/14/2021 5:00 PM EST	81 Hour(s) 0 Minute(s)	Virtual Instructor-Led Training (DOE)	FAI Instructor (Primary)	

9

Save

Cancel

Next »

The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.

ACQ 265 (FED): Mission Focused Services Acquisition

Search

☒ Tentative
☒ Approved
☐ Completed
☐ Cancelled

Session ID
Locator Number
Start Date:
to

Location
Instructor

Search

Create New Session

Sessions

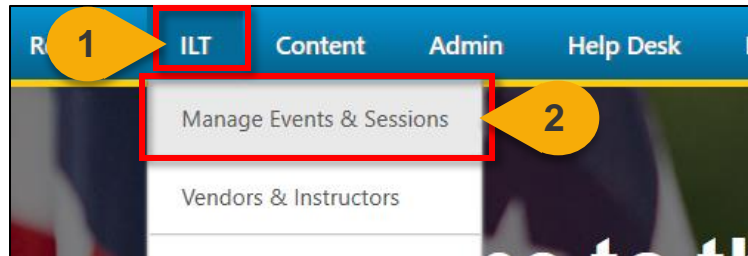
(2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15		Approved	

Cancel Sessions

When you want to cancel a Session...

Steps 1 & 2: Hover over the **ILT** tab, then click on **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.

A screenshot of the 'Manage Events & Sessions' page. The 'Search All Events' section is active. The 'Event Name' input field is highlighted with a red box and a yellow callout bubble with the number '3'. The page includes tabs for 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below the search fields, there is a 'Search' button.

Step 4: Click **Search** or hit **Enter**.

A screenshot of the 'Manage Events & Sessions' page, similar to the previous one. The 'Search' button is highlighted with a red box and a yellow callout bubble with the number '4'. The 'Event Name' field is also visible.


Cancel Sessions (Cont.1)

When you want to cancel a Session...

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.

Subjects Vendor		Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click the **Cancel** icon in the Options column to the right of the Session you would like to cancel.

Sessions									
Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15		Appr	

Step 7: The Session Details page will show details about the Session and Session Cancellation Options. Choose a reason for cancelling the Session in the **Please Select a Reason** dropdown menu.

Session Details

Event: ACQ 265 (FED): Mission Focused Services Acquisition

Registered: 0

Waitlisted: 0

Schedule: Date: 1/11/2021 8:00 AM - 1/14/2021 5:00 PM EST

Location: Virtual Instructor-Led Training (DOE) > Department of Energy (DOE) Acquisition

SESSION CANCELLATION OPTIONS

Please select a reason:

Select a reason

Other

Inclement Weather

Low Enrollment

Senior Management Choice

Systems Unavailable

Timeline Shift

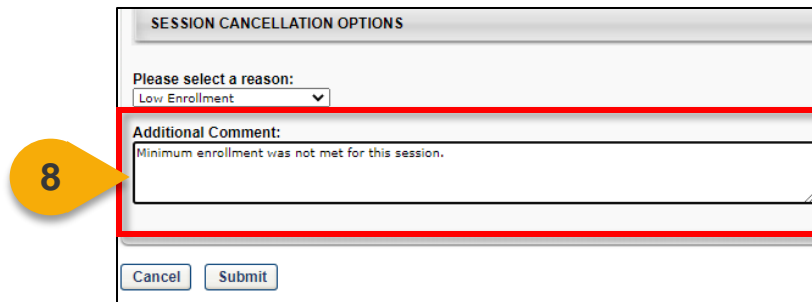
Trainer Unavailable

Select a reason

Cancel Sessions (Cont.2)

When you want to cancel a Session...

Step 8: Enter a **comment** providing more detail about why the Session is being cancelled.



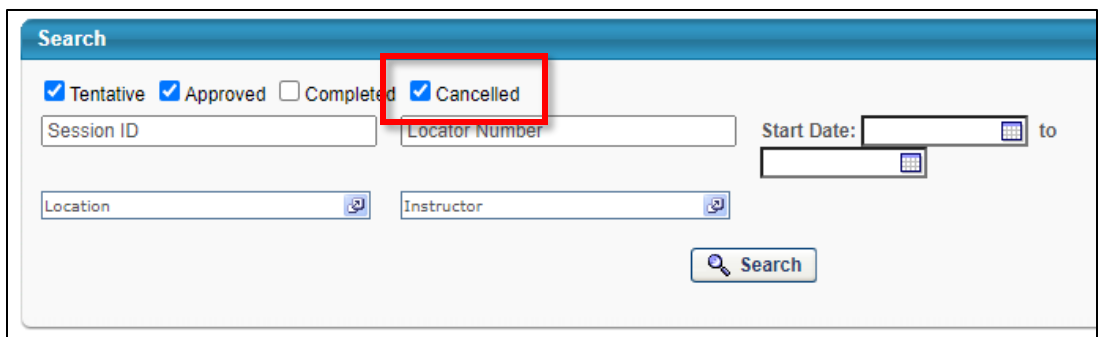
SESSION CANCELLATION OPTIONS

Please select a reason:
Low Enrollment

Additional Comment:
Minimum enrollment was not met for this session.

Cancel Submit

You will be returned to the Event page. If you need to view the Session you cancelled, toggle the **Cancelled** filter when searching for the Session.



Search

☒ Tentative ☒ Approved ☐ Completed ☒ Cancelled

Session ID: _____ Locator Number: _____ Start Date: _____ to _____

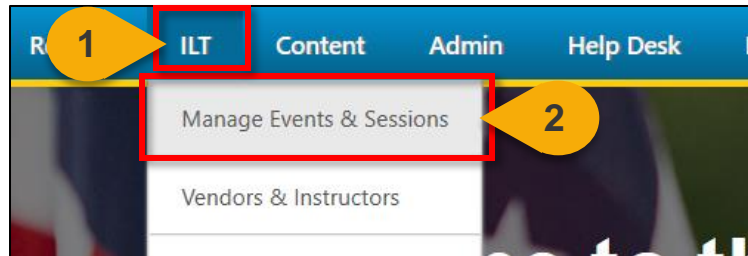
Location: _____ Instructor: _____

Search

View Roster

When you want to view the Roster for an ILT...

Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session belongs. Enter the **Event Name** into the search field.

A screenshot of the 'Manage Events & Sessions' page. The 'Search All Events' section is active. The 'Event Name' input field is highlighted with a red box and a yellow callout bubble with the number '3'. Other fields include 'Vendor', 'All Languages', 'Locator Number', and a 'View Active Events Only' checkbox. A 'Search' button is at the bottom right.

Step 4: Click **Search** or hit Enter.


A screenshot of the 'Manage Events & Sessions' page, similar to the previous one. The 'Search' button is highlighted with a red box and a yellow callout bubble with the number '4'. The 'Event Name' field is now populated with text.

View Roster (Cont.1)

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.

Subjects Vendor		Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click the **Roster** icon in the Options column to the right of the Session you would like to view the Roster for.

Sessions		(2 Results)							
Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			

Step 7: From this page, you may **view Users** on the Roster and Waitlist. Additionally, you can manage enrollment and attendance. See the Manage Roster task aid for more information.

Session Roster

Roster

Assignments

Attendance and Scoring

Unassigned (0)

Pending Payment (0)

Exception Requests (2)

Waitlisted (0)

Session Status: Approved

Session Start Date: 1/4/2021 8:00:00 AM

Session End Date: 1/7/2021 5:00:00 PM

Seats Available: 15/15

Attachments:

Choose File

No file chosen

Upload

RESOURCES

Add Attachment

No attachments have been uploaded for this Session

SCHEDULE

USERS

Print Sign-In Sheet

Add Users

Withdraw / Move Users

Download 'Bulk Add Users' template

Choose File

No file chosen

Upload users

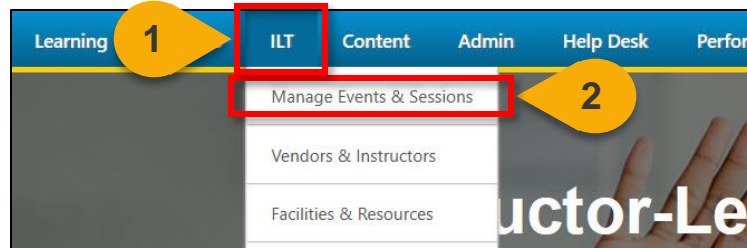
Show Withdrawn/Removed Users (0 Results)

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
------	---------	------------------------	-------	------------	-------	-----------	--------	---------

Manage Roster

When you want to edit a Roster...

Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions**.



Steps 3 & 4: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field. Click Search.

Home Learning Reports **ILT** Content Admin Help Desk Performance

Manage Events & Sessions

Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule new sessions.

[Waitlists](#) [Exception Requests](#) [Interest Tracking](#)

Search All Events

Search for events or sessions

☒ Search for all Events ☐ Search for all Sessions

Event Name Vendor

All Languages

or search for sessions directly by using locator number

Locator Number ☒ View Active Events Only

Step 5: Click on the **Calendar** icon to view the Sessions for the Event.

Legend

[Edit Evaluation](#) [View Evaluation Report](#) [Edit Event](#) [Copy Event](#) [View Sessions](#)

[Create New Event](#) [Export to Excel](#)

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Options
ACQ 285 (FED): Mission Focused Services Acquisition	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0	
Acquisition Fundamentals Brown Bag	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0	
APM 102: DHS Program Management Fundamentals	... Virtual Instructor-Led Training (VILT) ... Acquisition Management	Federal - Instructor-Led (ILT)	English (US)	0	3	0	
APM 102A: DHS Management Fundamentals #2	... Virtual Instructor-Led Training (VILT) ... Acquisition Management	Federal - Instructor-Led (ILT)	English (US)	0	1	0	

Manage Roster (Cont.1)

Step 6: Click on the **View Roster** icon to view the Roster.

[Create New Session](#)

Sessions									
(2 Results)									
Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			
Monday	1/4/2021	1/7/2021	EPA: ACQ 265FED-2021-01	47875	Virtual Instructor-Led Training (EPA)	0 of 15			

Step 7: From this page, you may manage the Roster and the Waitlist. In the Users section of the Roster, you will see the Users who have been granted seats in the Session. Use the icons in the **Options** column to edit the User's Transcript, view the user's enrollment history, or remove the User from the Roster.

USERS							
Print Sign-In Sheet Email Registered Users Add Users Withdraw / Move Users							
Download 'Bulk Add Users' template <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload users"/>							
<input type="checkbox"/> Show Withdrawn/Removed Users (2 Results)							
Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status
		General Services Administration (Organization)		0 of 1 Parts Attended			
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered

Step 8: See other task aids to learn how to email registered users, withdraw/move users, add users, and complete attendance. Click the **Waitlisted** link to view the Waitlist.

FAI 003 - FAI Registrar Event One Roster	
<div> Session Roster </div>	
<div> Roster Attendance and Scoring </div>	
<div> Inventory Unassigned (0) Pending Payment (0) Excepti </div>	
<div> Waitlisted (2) </div>	
Session Status: Approved Session Start Date: 1/28/2021 8:00:00 AM Session End Date: 1/28/2021 5:00:00 PM Seats Available: 0/2	

Manage Roster (Cont.2)

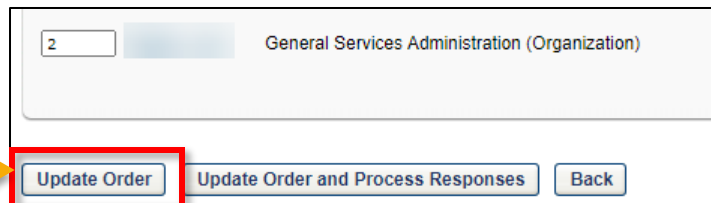
Step 9: The Waitlist will display. Edit Waitlist priority by **changing the numbers** in the Order column. The User with Order 1 will have first priority for an open spot in the course.



Printable Version Export to Excel

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
1		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM		<input type="radio"/> Grant <input type="radio"/> Deny
2		General Services Administration (Organization)	12/16/2020 2:00:45 PM		<input type="radio"/> Grant <input type="radio"/> Deny

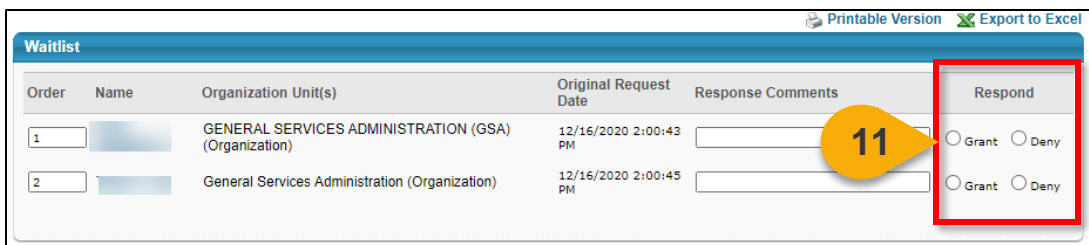
Step 10: Click **Update Order** to save these changes.



2 General Services Administration (Organization)

Update Order Update Order and Process Responses Back

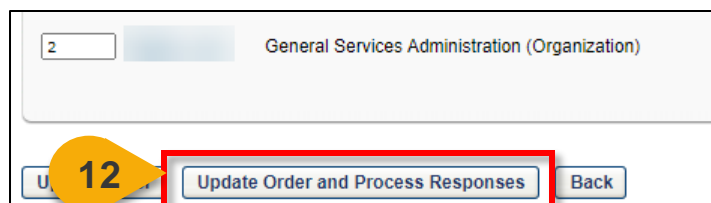
Step 11: If you would like add a User to the Roster, select **Grant** in the Respond column. If you would like to remove a user from the Waitlist without granting them a spot in the course, select the **Deny** option in the Respond column.



Printable Version Export to Excel

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
1		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM		<input type="radio"/> Grant <input type="radio"/> Deny
2		General Services Administration (Organization)	12/16/2020 2:00:45 PM		<input type="radio"/> Grant <input type="radio"/> Deny

Step 12: Click **Update Order and Process Responses** to save these changes.



2 General Services Administration (Organization)

U **Update Order and Process Responses** Back

Update Roster via Upload

When you want to upload an updated Roster...

Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions**.



Steps 3 & 4: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field. Click **Search**.

The screenshot shows the 'Manage Events & Sessions' page. The 'Search All Events' section is highlighted. The 'Event Name' field is highlighted with a red box and a yellow callout '3'. The 'Search' button is highlighted with a red box and a yellow callout '4'. The page includes a search bar with 'Search for events or sessions' and radio buttons for 'Search for all Events' and 'Search for all Sessions'. There is also a 'Vendor' dropdown and a 'View Active Events Only' checkbox.

Step 5: Click on the **Calendar** icon to view the sessions for the Event.

The screenshot shows the 'Events' table with columns: Event Name, Subjects, Vendor, Language(s), Tentative Sessions, Approved Sessions, Completed Sessions, and Options. The 'Calendar' icon in the 'Options' column is highlighted with a red box and a yellow callout '5'. The table shows 40 results.

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Options
ACQ 265 (FED): Mission Focused Services Acquisition	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0	[Icons]
Acquisition Fundamentals Brown Bag	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0	[Icons]
APM 102: DHS Program Management Fundamentals	Virtual Instructor-Led Training (vILT) Acquisition Management	Federal - Instructor-Led (ILT)	English (US)	0	3	0	[Icons]
APM 102A: DHS Management Fundamentals #2	Virtual Instructor-Led Training (vILT) Acquisition Management	Federal - Instructor-Led (ILT)	English (US)	0	1	0	[Icons]

Update Roster via Upload (Cont.1)

Step 6: Click on the **View Roster** icon for the desired session to see the Roster.

[Create New Session](#)

Sessions									
(2 Results)									
Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			
Monday	1/4/2021	1/7/2021	EPA: ACQ 265FED-2021-01	47875	Virtual Instructor-Led Training (EPA)	0 of 15			Approved

Step 7: Click on **Download 'Bulk Add Users' template**. A Microsoft Excel file will download.

SCHEDULE

USERS

[Print Sign-In Sheet](#) [Add Users](#) [Withdraw / Move Users](#)

[Download 'Bulk Add Users' template](#) [Browse...](#) [Upload users](#)

Step 8: Enter the **User ID** of each User you want to add to the Roster into the spreadsheet and save the file. Only 100 users can be uploaded in a single "Bulk Add Users" spreadsheet.

	A	B	C	D	E	F	G	H
1	Instructions							
2	emails? - For yes reply with 'Yes' and for no reply w Yes							
3	Enter user ID in the below column							
4	Do not remove instructions or change any headers							
5								
6	User ID							
7								
8								

Update Roster via Upload (Cont.2)

Step 9: On the Roster page, click on **Browse** and choose the Roster file you wish to upload.

The screenshot shows the 'USERS' section of the Roster page. At the bottom, there is a 'BROWSE...' button highlighted with a red box. A yellow callout bubble with the number 9 points to this button. Other buttons visible include 'Print Sign-In Sheet', 'Add Users', 'Withdraw / Move Users', and 'Download \'Bulk Add Users\' template'.

Step 10: Click on **Upload Users**.

The screenshot shows the 'USERS' section of the Roster page. At the bottom, there is an 'Upload users' button highlighted with a red box. A yellow callout bubble with the number 10 points to this button. Other buttons visible include 'Print Sign-In Sheet', 'Add Users', 'Withdraw / Move Users', and 'Download \'Bulk Add Users\' template'.

The new Users will appear on the Roster.

The screenshot shows the 'USERS' section of the Roster page. Below the navigation buttons, there is a table with the following columns: Name, User ID, Organizational Unit(s), Email, Attendance, Score, Pass/Fail, Status, and Options. Two new users are listed, both with the status 'Registered' and '0 of 1 Parts Attended'. The table is highlighted with a red box.

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered	
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered	

Users are added to the session, not to a session's individual session parts. Attendance of session parts is marked by the instructor.

Add Walk-Ins to Roster or Users to Waitlist

When you want to add a User to a Session...

Step 1: Navigate to the Session Roster using the View Session Roster task aid. Click on **Add Users**.

Session Roster

Roster Attendance and Scoring

Session Status: Approved
Session Start Date: 1/25/2021 8:00:00 AM
Session End Date: 1/25/2021 5:00:00 PM
Seats Available: 5/7
Attachments: Choose File No file chosen Upload

RESOURCES

Add Attachment

No attachments have been uploaded for this Session

SCHEDULE

USERS

Print Sign-In Sheet Email Report Add Users Withdraw / Move Users

Download Bulk Add Users template Choose File No file chosen Upload users

Step 2: A popup will appear. Enter the user's **name** in the appropriate fields. You can also search by User ID, User Name, or Manager's Last Name.

Select User

Search is limited to 1000 records only

Search

Last Name: First Name: ID: Manager's Last Name: Search

(0 Results)

Search Results

ADD	NAME	IDENTIFIER	ID	USER NAME	MANAGER
-----	------	------------	----	-----------	---------

Close


Add Walk-Ins to Roster or Users to Waitlist (Cont.1)

Step 3: Click Search.

Select User

Search is limited to 1000 records only

Search

Last Name: ID: Manager's Last Name:
First Name: User Name: **3** 

(0 Results)

Search Results

ADD	NAME	IDENTIFIER	ID	USER NAME	MANAGER
-----	------	------------	----	-----------	---------


[Close](#)

Step 4: Select the blue plus sign next to the user you'd like to add to the Roster.




Select User

Search is limited to 1000 records only

Search

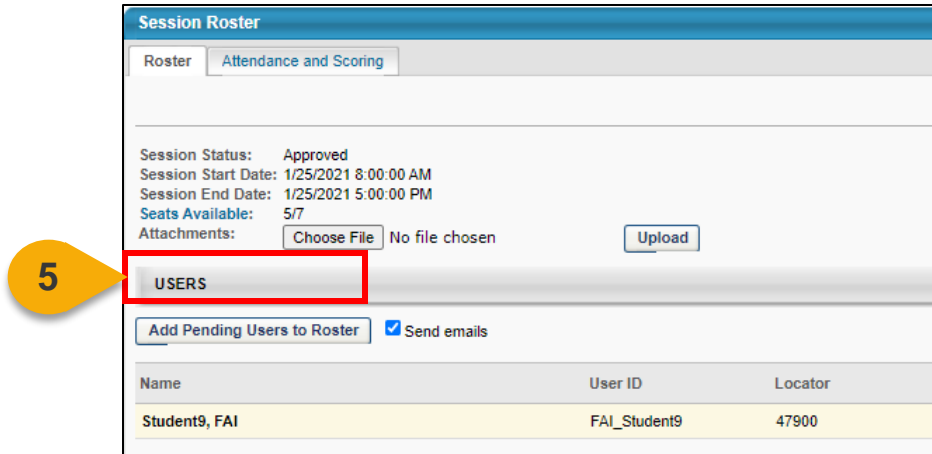
Last Name: ID: Manager's Last Name:
First Name: User Name: 

Search Results

ADD	NAME	IDENTIFIER	ID	USE
	Student 8, FAI	Federal Organizations (Organization) FAI Admin (Manager)	FAI_Student8	FAI_S
	Student2, FAI	Acquisition Professional Career Program (Organization) FAI Manager1 (Manager)	FAI_Student2	FAI_S
 4	FAI	Bureau Of Immigration And Customs Enforcement (Organization) FAI Manager2 (Manager)	FAI_Student3	FAI_S

Add Walk-Ins to Roster or Users to Waitlist (Cont.2)

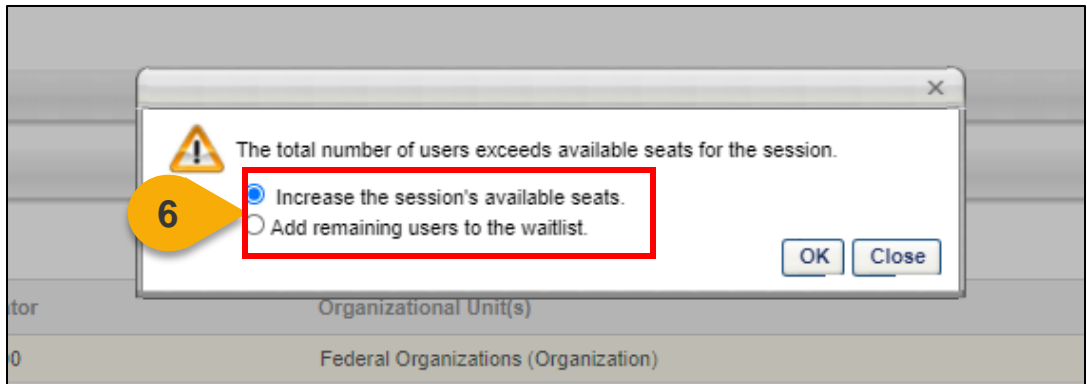
Step 5: The user will appear under the **Users** section. Click **Add Pending Users to Roster**. This button will bypass any approval workflows and add the person to the roster as registered.



The screenshot shows the 'Session Roster' interface. The 'Roster' tab is selected. The 'Attendance and Scoring' sub-tab is also visible. The session status is 'Approved'. The session start date is 1/25/2021 8:00:00 AM and the session end date is 1/25/2021 5:00:00 PM. The seats available are 5/7. The attachments section shows 'Choose File' and 'No file chosen' with an 'Upload' button. The 'USERS' section is highlighted with a red box, and a yellow callout bubble with the number 5 points to it. Below the 'USERS' section, there is a button 'Add Pending Users to Roster' and a checkbox 'Send emails' which is checked. A table below shows the user information:

Name	User ID	Locator
Student9, FAI	FAI_Student9	47900

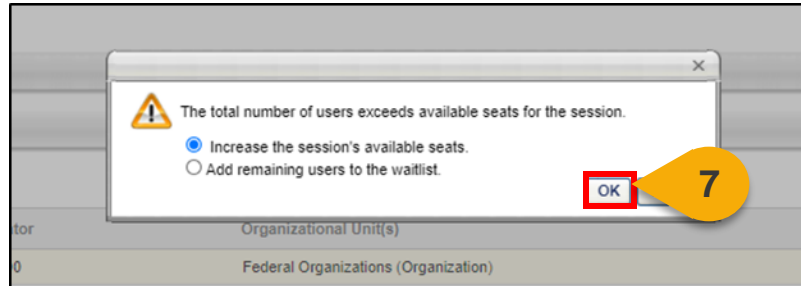
Step 6: If the Roster is full or if you are adding users who fall outside the Enrollment Restrictions, a popup will appear with a warning message. You have the option to either **Increase the Session's available seats** or **Add remaining users to the waitlist**.



The screenshot shows a warning popup dialog box. The message reads: 'The total number of users exceeds available seats for the session.' There are two radio button options: 'Increase the session's available seats.' (which is selected) and 'Add remaining users to the waitlist.' A red box highlights these two options, and a yellow callout bubble with the number 6 points to it. The dialog box has 'OK' and 'Close' buttons at the bottom right. The background shows a list of organizational units.

Add Walk-Ins to Roster or Users to Waitlist (Cont.3)

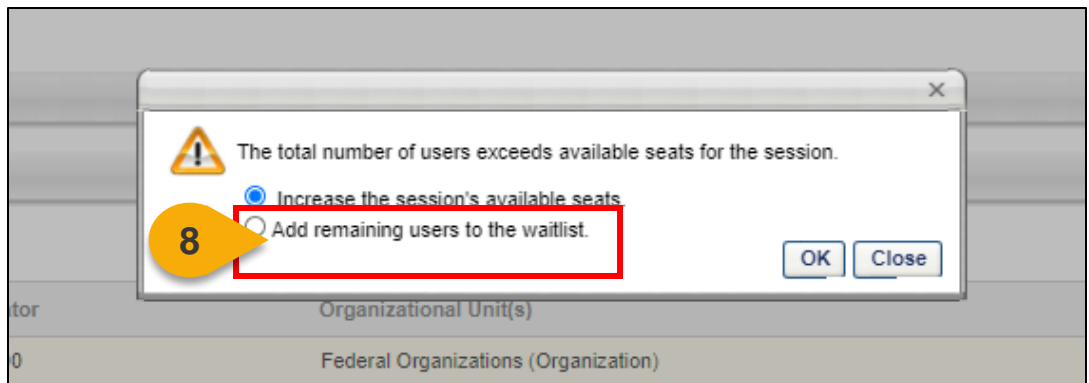
Step 7: After choosing your preferred option, select **OK**.



You will be taken back to the Roster and if you added the User, they would appear on the User list.

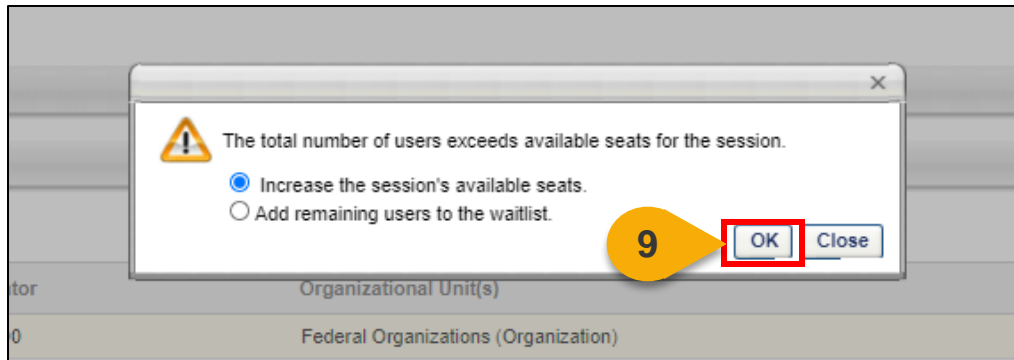
A screenshot of a web application interface showing a table of users. The table has a header row with "Name" and "User ID". Below the header, there are two rows of user data. The first row has "Burger, " in the Name column and a greyed-out User ID. The second row has "Martinez, " in the Name column and a greyed-out User ID. A red rectangular box highlights the first two rows of the table. To the right of the table, there is a section labeled "(3 Results)" and a table with columns "ss" and "Session Completion". The first row of this table has "1/25/2021" in the "Session Completion" column. The second row has "1/25/2021" in the "Session Completion" column. Below the table, there is a row with "Student 8: FAI" and "FAI_Student8".

Step 8: If you want to add users to the waitlist, follow the same process for adding a walk in to the Roster. Then select **Add Remaining Users to the waitlist**.

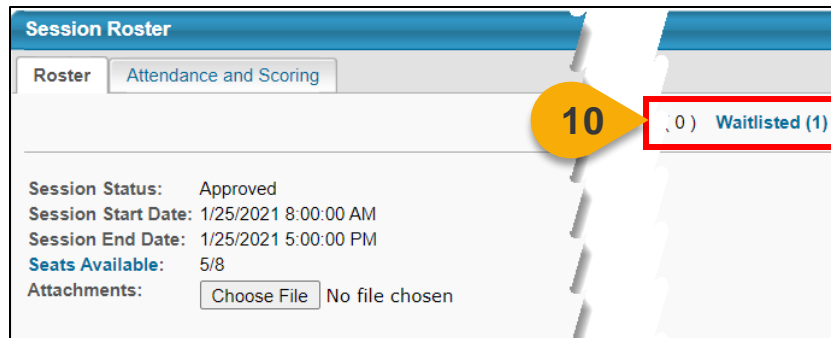


Add Walk-Ins to Roster or Users to Waitlist (Cont.4)

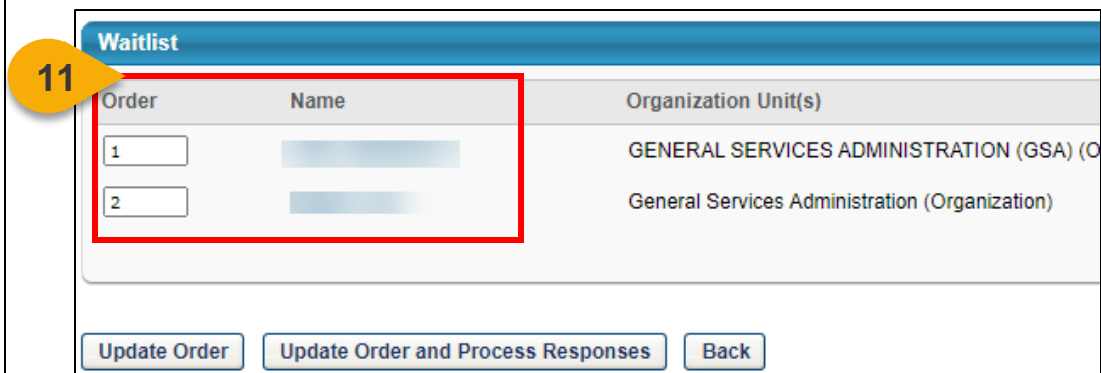
Step 9: Click **OK**.



Step 10: The user will then be added to the waitlist. Click on the **Waitlisted** to access the Waitlist for this Session.



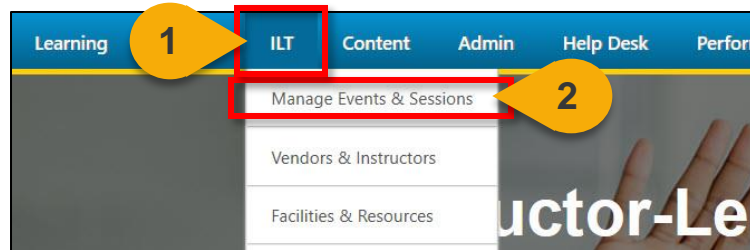
Step 11: The Waitlist page will show **all Users** on the Waitlist and allow for editing of student's priority order on the Waitlist.



Upload Attendance

When you want to upload an attendance sheet to the Roster...

Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions**.



Step 3: Select **Search for all Sessions**.

A screenshot of the 'Manage Events & Sessions' page. The page title is 'Manage Events & Sessions'. Below the title, there is a description: 'Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events.' There are three buttons: 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below these buttons is a section titled 'Search All Events'. Under this section, there are two radio buttons: 'Search for all Events' and 'Search for all Sessions'. The 'Search for all Sessions' option is highlighted with a red box and a yellow callout bubble with the number '3'. Below the radio buttons are two input fields: 'Event Name' and 'Subject'.

Step 4: Enter the search criteria for the Session.

A screenshot of the 'Manage Events & Sessions' page, showing the search criteria input fields. The page title is 'Manage Events & Sessions'. Below the title, there is a description: 'Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule events.' There are three buttons: 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below these buttons is a section titled 'Search All Events'. Under this section, there are two radio buttons: 'Search for all Events' and 'Search for all Sessions'. The 'Search for all Sessions' option is selected. Below the radio buttons are three input fields: 'Event Name', 'Subject', and 'Vendor'. There is also a dropdown menu for 'All Languages'. Below these fields is a section titled 'or search for sessions directly by using locator number'. This section contains a 'Locator Number' input field and a checkbox labeled 'View Active Events Only'. A 'Search' button is located at the bottom right of the search area. A red box highlights the entire search area, and a yellow callout bubble with the number '4' points to it.

Upload Attendance (Cont.1)

Step 5: Click Search.

Event Name Subject Vendor

All Languages

search for sessions directly by using locator number

Locator Number ☒ View Active Events Only

Search

Step 6: Click on the Users icon under the Session Options column of the session of your choice.

Enrollment	Status	Event Options	Session Options
30 of 30	Approved		
0 of 15	Approved		

Step 7: Click on the Attendance and Scoring tab.

CON 124 (FED): Contract Execution Roster

Session Roster

Roster **Attendance and Scoring**

Session Status: Approved

Session Start Date: 3/24/2021 8:00:00 AM

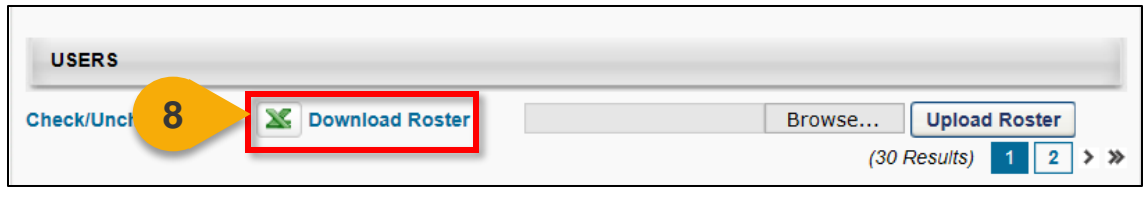
Session End Date: 3/24/2021 5:00:00 PM

Seats Available: 0/30


Attachments: **Browse...** **Upload**

Upload Attendance (Cont.2)

Step 8: Click on **Download Roster**. The file will download to your computer.



USERS

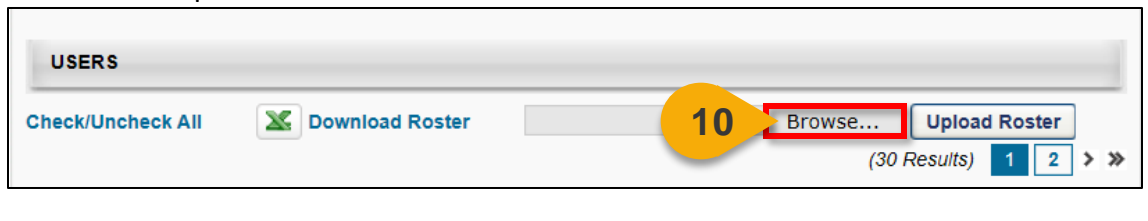
Check/Uncheck All **8**  Download Roster Browse... Upload Roster

(30 Results) 1 2 > >>


Step 9: In the Excel file you downloaded, update the **Score, Pass, and Part Attendance** columns for each user. Save the file.

Instructions to be followed for 'Bulk Update Attendance' Feature [Do not delete]							
Do not update the headings of the column							
Do not add or remove any record							
Only score, Pass and Part Attendance column values can be updated							
Pass and Part fields can only have the values as - 'Yes', 'No'							
Name [Do User ID]	Score	Pass	Part1				
	100	Yes	Yes	9			
	100	Yes	Yes				

Step 10: On the Roster page, click on **Browse** and select the attendance sheet you would like to upload.

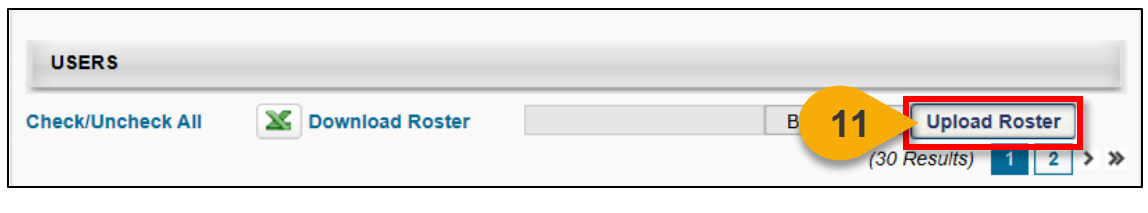


USERS


Check/Uncheck All  Download Roster **10** Browse... Upload Roster

(30 Results) 1 2 > >>

Step 11: Click on **Upload Roster**. The attendance sheet will then be uploaded.



USERS

Check/Uncheck All  Download Roster Browse **11** Upload Roster

(30 Results) 1 2 > >>

Upload Attendance (Cont.3)

Step 12: The Attendance page will update. Click **Save** to save the updated attendance.

Name	User ID	Attendance	Score	Pass	Session Completion
		<input checked="" type="checkbox"/> 1	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	1/28/2021
		<input checked="" type="checkbox"/> 1	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	1/28/2021

12

Step 13: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok**.

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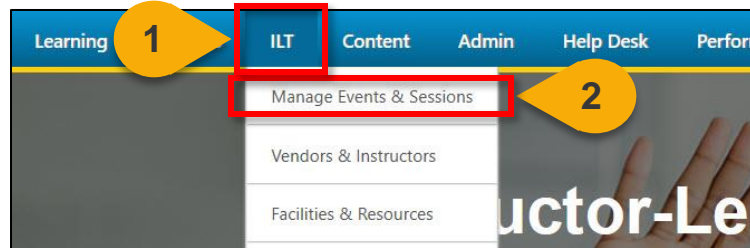
Your attendance and scoring updates are now being processed. This process takes approximately 15 minutes or less to complete. Please remember to re-submit the roster if you would like to update the students' transcript statuses to reflect attendance and scoring changes. You do not need to wait for this process to complete before re-submitting the roster.

13

Manually Complete Attendance

When you want to manually update attendance in the Roster...

Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions**.



Step 3: Select **Search for all Sessions**.

A screenshot of the 'Manage Events & Sessions' page. The page title is 'Manage Events & Sessions'. Below the title, there is a description: 'Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create'. There are three buttons: 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below these buttons is a section titled 'Search All Events'. Inside this section, there are two radio buttons: 'Search for all Events' (selected) and 'Search for all Sessions' (highlighted with a red box and a yellow callout bubble with the number '3'). Below the radio buttons are input fields for 'Event Name', 'Subject', and 'Vendor'.

Step 4: Fill out the search criteria for the Session you wish to view.

A screenshot of the 'Search All Sessions' form. The form has a title 'Search All Sessions' and a group of checkboxes: 'Tentative' (checked), 'Approved' (checked), 'Completed' (unchecked), and 'Cancelled' (unchecked). Below the checkboxes, there are several input fields: 'Session ID', 'Locator Number', 'Location', 'Instructor', 'Event Name', 'Subject', 'Start Date', 'End Date', and 'Vendor'. A red box highlights the entire form area, and a yellow callout bubble with the number '4' points to the 'Search' button at the bottom right.

Manually Complete Attendance (Cont.1)

Step 5: Click Search.

Manage Events & Sessions

Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule

[Waitlists](#) [Exception Requests](#) [Interest Tracking](#)

Search All Events

Search for events or sessions

☒ Search for all Events ☐ Search for all Sessions



























Event Name Subject Vendor

All Languages

or search for sessions directly by using locator number

Locator Number ☒ View Active Events Only

Step 6: Click the **Users** icon under the Options column of the session of your choice.

Enrollment	Status	Event Options	Session Options
30 of 30	Approved	    	       
0 of 15	Approved	    	       

Step 7: Click the **Attendance and Scoring** tab.

CON 124 (FED): Contract Execution Roster

Session Roster

Roster [Attendance and Scoring](#)

Session Status: Approved

Session Start Date: 3/24/2021 8:00:00 AM

Session End Date: 3/24/2021 5:00:00 PM

Seats Available: 0/30

Attachments:

Manually Complete Attendance (Cont.2)

Step 8: For each user, mark the **Attendance**, **Score**, and **Pass** columns to update attendance.

Name	User ID	Attendance	Score	Pass	Session Completion
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021

Step 9 Click **Save**. The Roster's attendance will now be updated.

		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021

Step 10: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok**.

corporate4proxy-stg.csod.com says

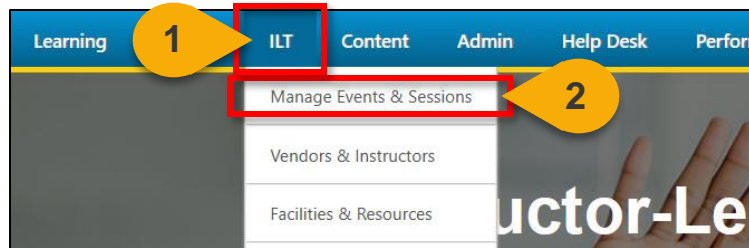
Your attendance and scoring updates are now being processed. This process takes approximately 15 minutes or less to complete. Please remember to re-submit the roster if you would like to update the students' transcript statuses to reflect attendance and scoring changes. You do not need to wait for this process to complete before re-submitting the roster.

OK

Move Users Between Sessions

When you want to move a User to another Session...

Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions**.



Step 3: Click on **Search for all Sessions**.

Step 4: Fill out the **search criteria** for the Session you wish to find.



























Move Users Between Sessions (Cont.1)

Step 5: Click Search.

All Languages
or search for sessions directly by using locator number
Locator Number ☒ View Active Events Only

5





Step 6: Click on the Users icon under the Options column of the session of your choice.


Enrollment	Status	Event Options	Session Options
30 of 30	Approved	    	       
0 of 15	Approved	    	       

Step 7: In the Users panel, click the Withdraw/Move Users link.

SCHEDULE

USERS

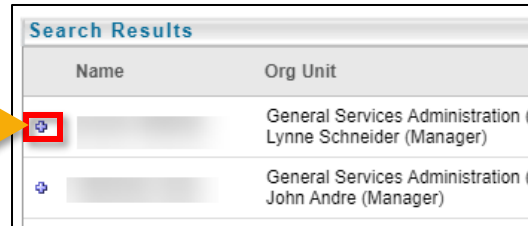
 Print Sign-In Sheet  Email Registered Users  Add Users  Withdraw / Move Users



 Download 'Bulk Add Users' template No file chosen

☐ Show V

Move Users Between Sessions (Cont.2)

Step 8: In the Withdraw/Move Users window, click the **blue +** next to the Users you wish to move to different Session.



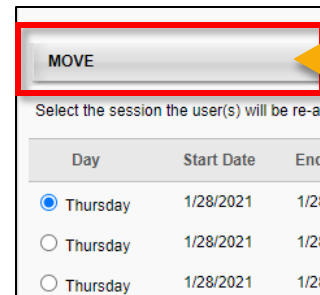
Search Results	
Name	Org Unit
 [Redacted Name]	General Services Administration (Lynne Schneider (Manager))
 [Redacted Name]	General Services Administration (John Andre (Manager))

Step 9: After you have selected the desired Users, click **Move** at the bottom of the window.



Step 10: A new window will open. Scroll down to the **Move** section.

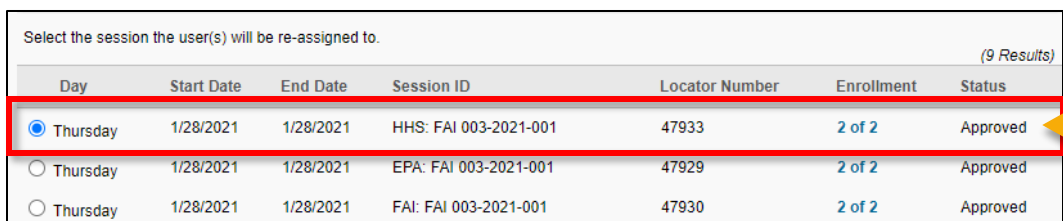


MOVE

Select the session the user(s) will be re-assigned to.

Day	Start Date	End Date
<input checked="" type="radio"/> Thursday	1/28/2021	1/28/2021
<input type="radio"/> Thursday	1/28/2021	1/28/2021
<input type="radio"/> Thursday	1/28/2021	1/28/2021

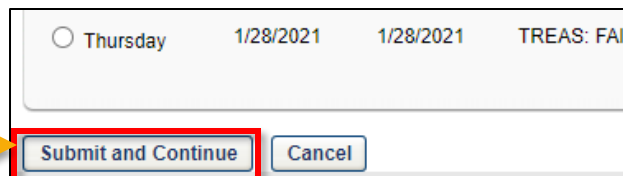
Step 11: Select the **Session** you would like to move the User(s) to.



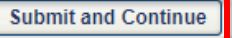

Select the session the user(s) will be re-assigned to. (9 Results)

Day	Start Date	End Date	Session ID	Locator Number	Enrollment	Status
<input checked="" type="radio"/> Thursday	1/28/2021	1/28/2021	HHS: FAI 003-2021-001	47933	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	EPA: FAI 003-2021-001	47929	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	FAI: FAI 003-2021-001	47930	2 of 2	Approved

Step 12: Click **Submit and Continue**.




☐ Thursday 1/28/2021 1/28/2021 TREAS: FAI

Move Users Between Sessions (Cont.3)

Step 13: You will then need to assign the new training to the User. Add any **comments** on the Assign Training screen.

Assign Training

 **FAI 001 - FAI Instructor Event One**

Session | Federal - Instructor-Led (ILT) | 9 Hours 0 Minutes

Details

Start Date: 1/25/2021 (Monday) 8:00 AM EST
End Date: 1/25/2021 (Monday) 5:00 PM EST
Description:
Price: \$0.00
Credits: 8
Enrollment: 3 of 8
Available Languages: English (US)

Schedule: 1/25/2021 8:00 AM - 1/25/2021 5:00 PM

Comments

☒ Automatically register users

13

Step 14: Click **Submit** to enroll the User in the new Session. The User will now appear on the new Roster.

Comments

☒ Automatically register users

Seats Available

USERS

Check/Uncheck All
☒

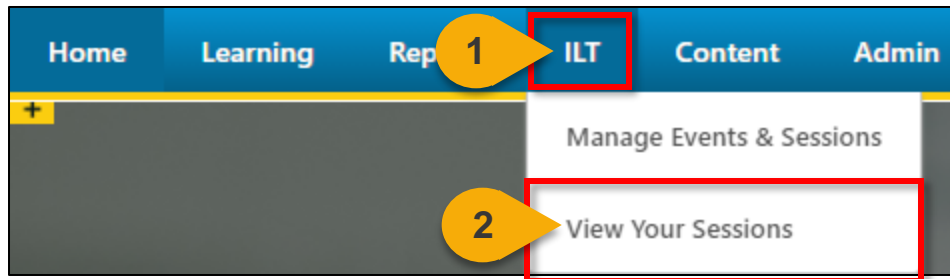
Submit **Cancel**

14

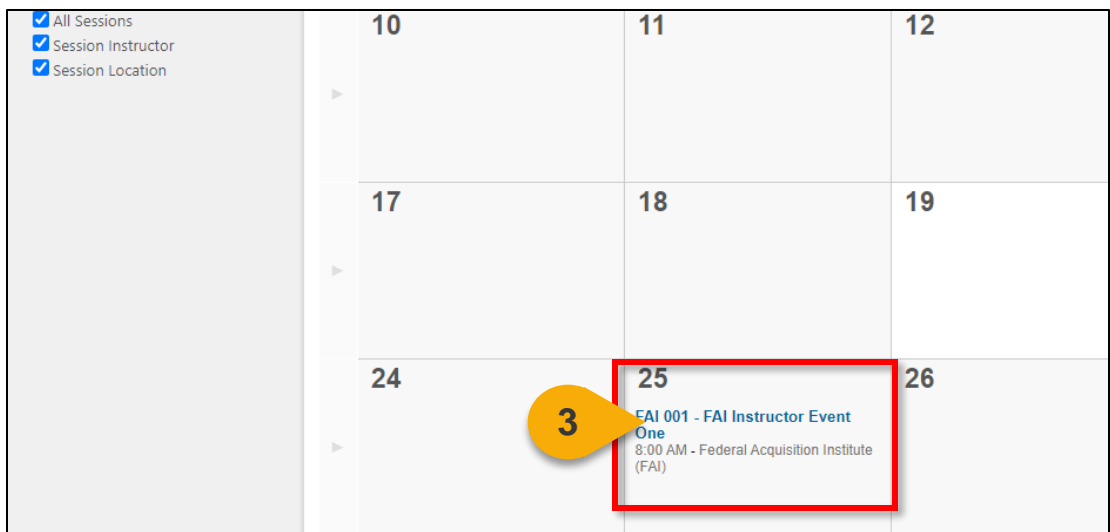
Send Emails from Roster

When you need to email students enrolled in a Session...

Steps 1 & 2: Hover over the **ILT** tab and select **View Your Sessions**.



Step 3: Click the **Session** you wish to view the Roster for.



Send Emails from Roster (Cont.1)

Step 4: Click on **View Roster** to view the Roster for this Session.

PARTS / SCHEDULE

JAN 25 Mon, Jan 25, 2021, 8:00 AM - 5:00 PM EST
DOJ: FAI 001-2021-01

Federal Organizations - Locations > Federal Acquisition Institute (FAI)

4 **View Roster**

Step 5: On the Roster, click **Email Registered Users**.

Session Roster

Roster Attendance and Scoring

Session Status: Approved
Session Start Date: 1/25/2021 8:00:00 AM
Session End Date: 1/25/2021 5:00:00 PM
Seats Available: 5/7
Attachments: No file chosen

RESOURCES

[Add Attachment](#)

No attachments have been uploaded for this Session

SCHEDULE

USERS

5

No file chosen

Send Emails from Roster (Cont.2)

Step 6: Enter an **Email Title** to give a description of the nature of this email.

Add Email

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.

[Click here for help.](#)



Note: Files uploaded through the Image or Document Manager will be stored

Action Send Email Event

6

Email Title New e-mail

From Address

Reply-To Address

Add Email

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.

[Click here for help.](#)



Note: Files uploaded through the Image or Document Manager will be stored

Action Send Email Event

Email Title New e-mail

7

From Address

Reply-To Address


Send Emails from Roster (Cont.3)

Step 8: Enter a **Reply-To Address** which recipients can respond.

Add Email

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.
[Click here for help.](#)

 **Note:** Files uploaded through the Image or Document Manager will be stored on the server.

Action	Send Email Event
Email Title	New e-mail
From Address	
8 Reply-To Address	

Step 9: Click **Display a list of tags that can be used within the subject** to show a list of available tags you can use in the Subject and Body of the email.

Tags are replaced with the corresponding values when emails are sent.

9 Tags	Display a list of tags that can be used within the subject	
Subject		
Deep Link	Base URL	Page URL
	Default	Select

Step 10: Input the **Subject** of your email.

Tags are replaced with the corresponding values when emails are sent.

10 Tags	Display a list of tags that can be used within the subject	
Subject		
Deep Link	Base URL	Page URL
	Default	Select

Send Emails from Roster (Cont.4)

Step 11: Use the **Deep Link dropdown** options to create a link to a page in CSOD.

Tags are replaced with the corresponding values when emails are sent.

Tags Display a list of tags that can be used within the subject

Subject

Base URL **Page URL**

Deep Link **11**

Step 12: Enter the body of the email into the **Message** field. This field is where you write in the body of your email. You can choose to send the email as Plain Text or in HTML.

Message ☒ HTML ☐ Plain Text

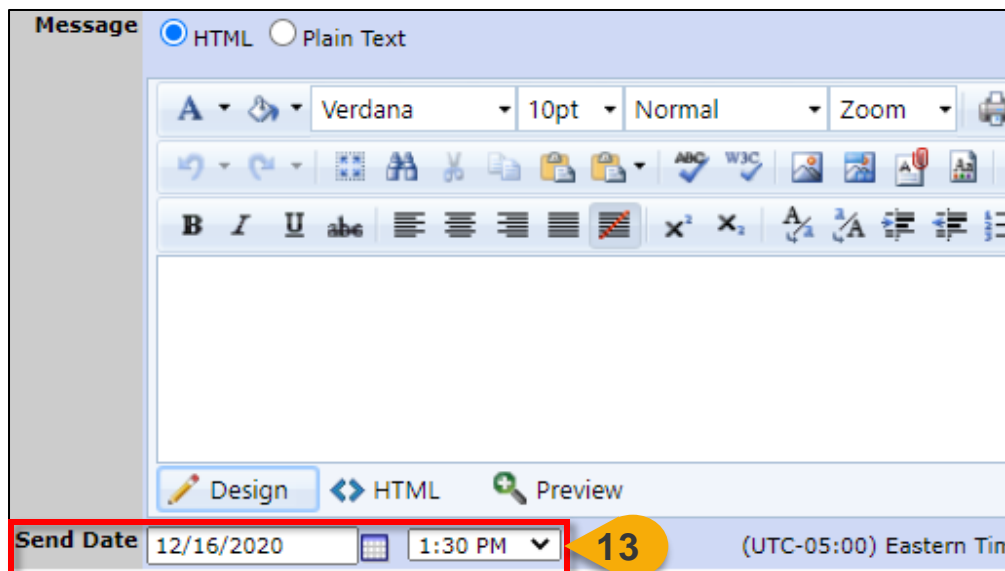
12

Design ☒ HTML ☐ Preview

Send Date (UTC-05:00) Eastern Time

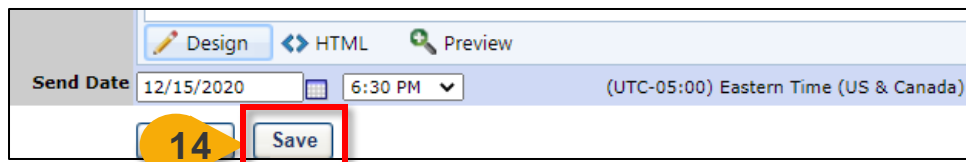
Send Emails from Roster (Cont.5)

Step 13: Select a **Send Date**. This is the date and time at which the email will send.



The screenshot shows the 'Message' window with the 'HTML' radio button selected. The 'Send Date' field is highlighted with a red box, and a yellow callout bubble with the number 13 points to it. The 'Send Date' field displays '12/16/2020' and '1:30 PM'. The time is set to '(UTC-05:00) Eastern Time'.

Step 14: Click **Save** to send the email.



The screenshot shows the 'Message' window with the 'Save' button highlighted with a red box, and a yellow callout bubble with the number 14 points to it. The 'Send Date' field displays '12/15/2020' and '6:30 PM'. The time is set to '(UTC-05:00) Eastern Time (US & Canada)'.

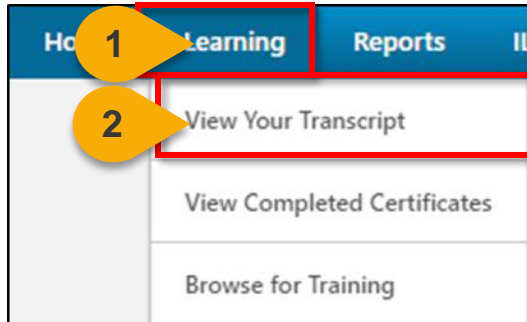
External Training



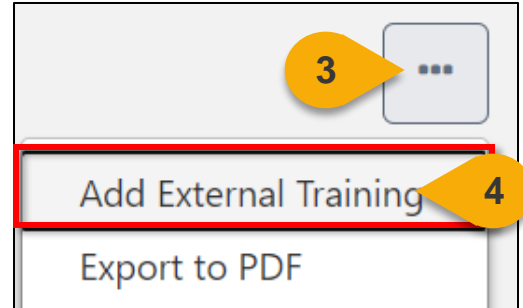
Request External Training Credit from Transcript

When you want to add an external training to your Transcript...

Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



Steps 3 & 4: Click on the **ellipsis button** at the top left-hand corner. Then click on **Add External Training**.



Step 5: Enter the title of your external training in the **Title** field.

A screenshot of a text input field labeled 'Title *'. The field is empty and has a red border. A yellow callout '5' points to the field.

Step 6: Enter a description of the external training in the **Training Description** field.

A screenshot of a text input field labeled 'Training Description *'. The field is empty and has a red border. A yellow callout '6' points to the field.

Step 7: Enter the name of the provider of the external training in the **Provider** field.

A screenshot of a text input field labeled 'Provider *'. The field is empty and has a red border. A yellow callout '7' points to the field.

Step 8: Enter the start and end dates of your external training in the **Start Date** and **End Date** fields.


A screenshot of a form section labeled 'Training Dates *'. It contains two input fields: 'Start Date' and 'End Date'. Both fields are empty and have a red border. A yellow callout '8' points to the 'End Date' field.

Step 9: Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

A screenshot of a form section labeled 'Training Hours *'. It contains two input fields: 'Hours' and 'Minutes'. Both fields have the number '0' entered and have a red border. A yellow callout '9' points to the 'Minutes' field.

Request External Training Credit from Transcript (Cont.1)

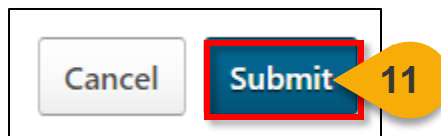
Step 10: Click **Select File** to add proof of your successful completion of your External Training.



Attachment(s) *

10 Select a file

Step 11: Click **Submit** to submit the form for approval.

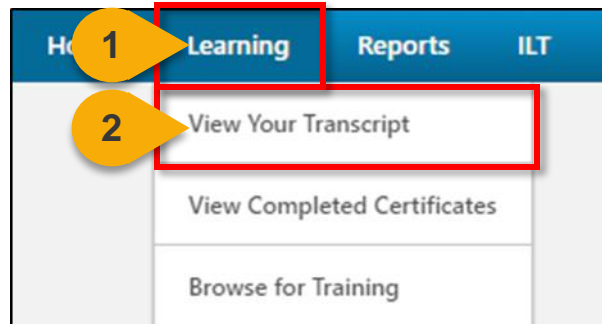


Cancel Submit 11

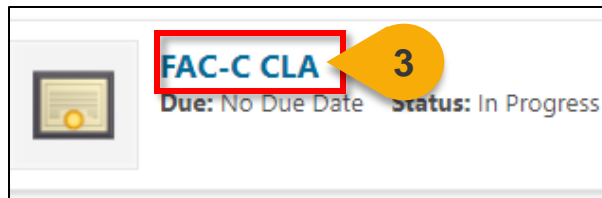
Request External Training Credit Within a Certification

When you want to request external credit from within the certification...

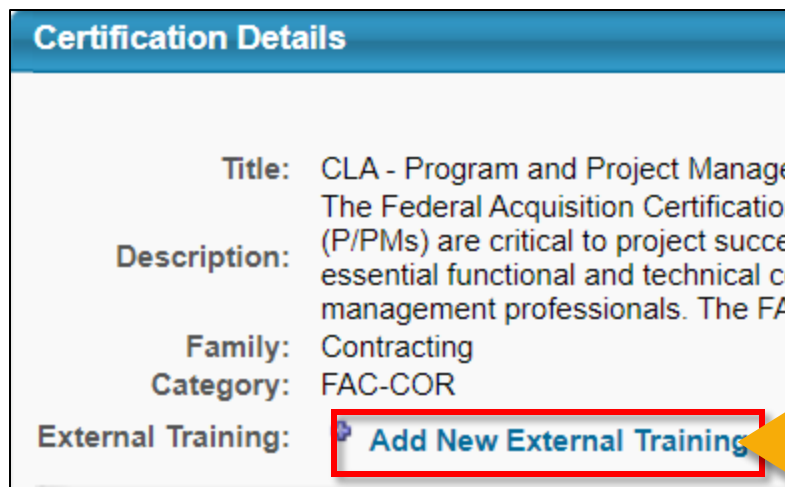
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



Step 3: Click on the **title** of the certification where you want to add an external training.

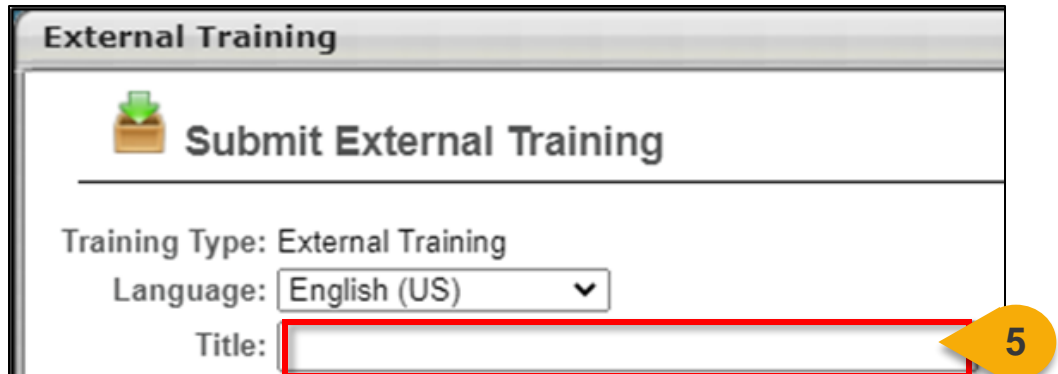


Step 4: Click on **Add New External Training**.

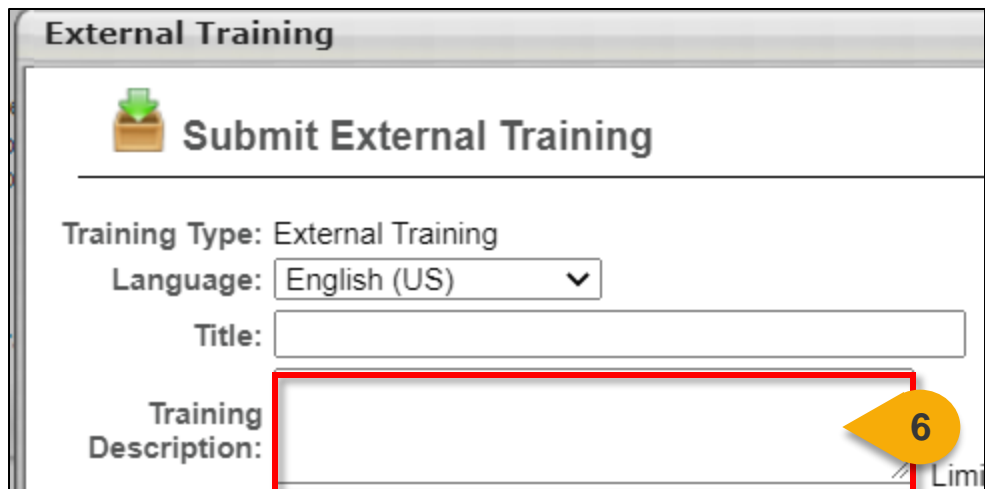


Request External Training Credit Within a Certification (Cont.1)

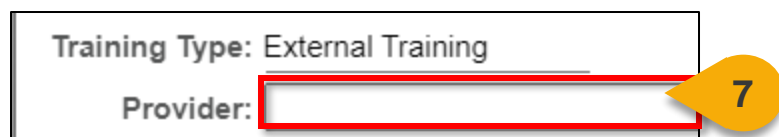
Step 5: A popup will appear. Enter the title in the **Title** field.



Step 6: Enter a description of the external training into the **Training Description** field.



Step 7: Enter the name of the institution into the **Institution** field.



Request External Training Credit Within a Certification (Cont.2)

Step 8: Enter the dates of your external training in the **Training Dates** field.

Training Dates: From To

Step 9: Enter the number of hours and minutes of the external training into the **Training Hours** text fields.

Training Hours: Hours Minutes

Step 10: Click the **dropdown button** next to the External Training category field

External Training Category:

Step 11: Select the applicable **type of training** from the External Training Category dropdown.

External Training Category:

- Select
- Training/Education
- Professional Organization/Events
- Publishing Articles
- Participation in Experiential Activities
- Other

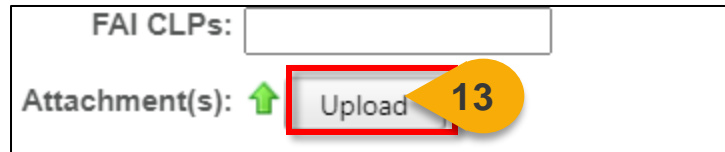
Step 12: Enter the number of CLPs into the **FAI CLPs** field.

FAI CLPs:


Attachment(s):

Request External Training Credit Within a Certification (Cont.3)


Step 13: Click **Upload** to add any supporting documents to the Attachments section if necessary.




FAI CLPs:

Attachment(s): 

Step 14:: Click the **dropdown button** next to the Apply Training To field.



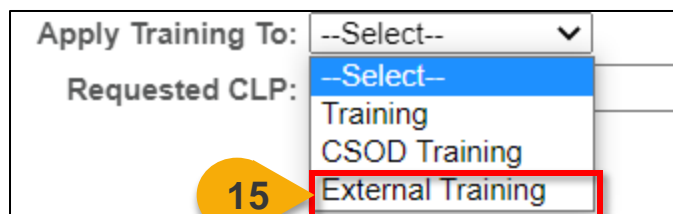
FAI CLPs:

Attachment(s): 

Apply Training To:

Requested CLP:

Step 15: Select **External Training** from the dropdown.



Apply Training To:

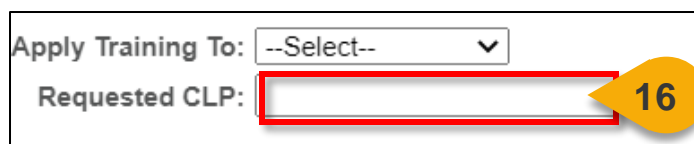
Requested CLP:

Training

CSOD Training

External Training

Step 16: Enter the **number of CLPs** earned in the Requested CLP field.

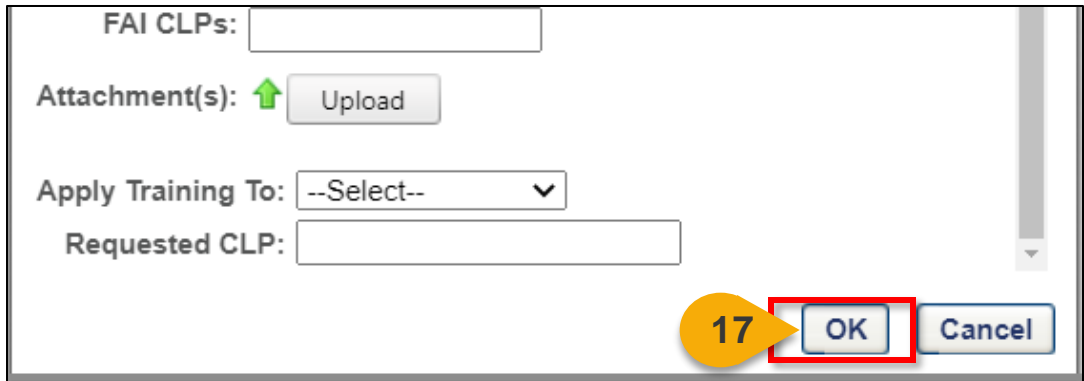


Apply Training To:

Requested CLP:

Request External Training Credit Within a Certification (Cont.4)

Step 17: Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.

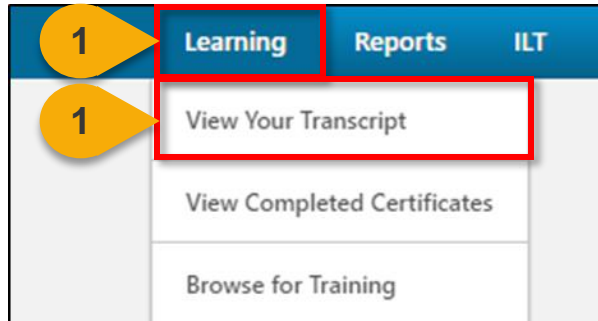


The screenshot shows a web form titled "FAI CLPs:" with several input fields and buttons. The fields include "Attachment(s):" with an "Upload" button, "Apply Training To:" with a "--Select--" dropdown, and "Requested CLP:" with a text input field. At the bottom right, there are "OK" and "Cancel" buttons. A yellow callout bubble with the number "17" points to the "OK" button, which is also highlighted with a red rectangular box.

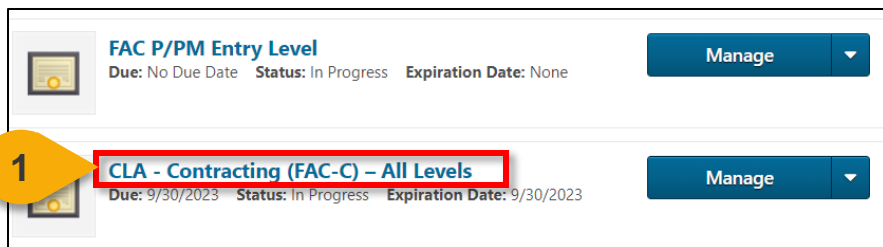
Add External Training to a Certification

When you want to submit external training from your transcript to fulfill a certification requirement...

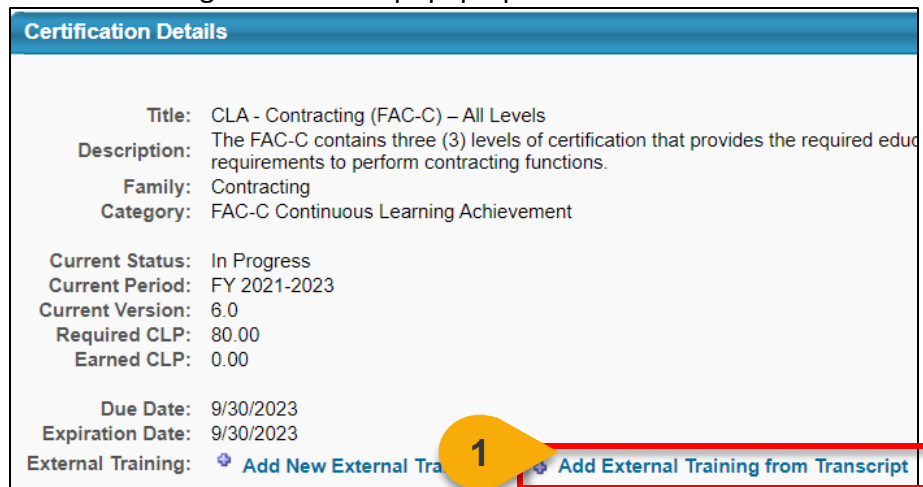
Steps 1 & 2: Hover over the **Learning** tab and then click **View Your Transcript**.



Step 3: Click on the **title** of the Certificate to which you'd like to add your external training.

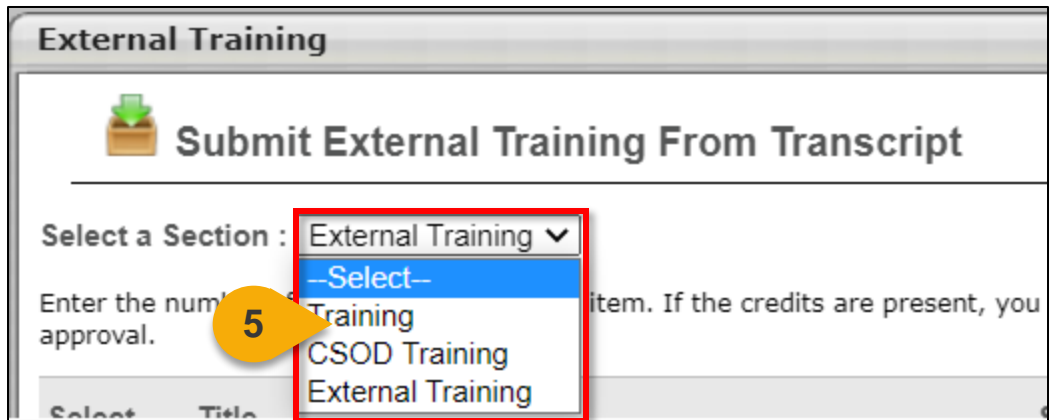


Step 4: Click the **Add External Training from Transcript** link. This opens the Submit External Training from Transcript pop-up.



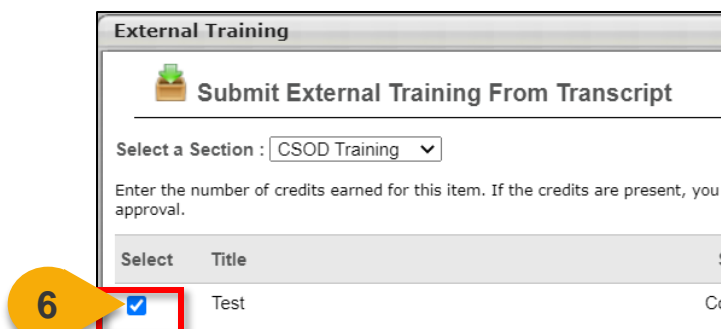
Add External Training to a Certification (Cont.1)

Step 5: Click the dropdown next to Select a Section to choose the section of the certificate that the training will be applied to



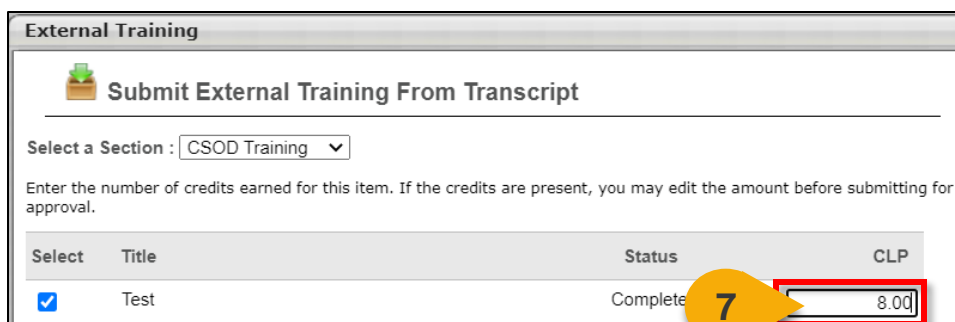
The screenshot shows the 'External Training' form with the title 'Submit External Training From Transcript'. The 'Select a Section' dropdown menu is open, showing options: '--Select--', 'Training', 'CSOD Training', and 'External Training'. A red box highlights the dropdown menu, and a yellow callout bubble with the number '5' points to it.

Step 6: Mark the checkbox next to the training item that you'd like to submit external training for.



The screenshot shows the 'External Training' form with the title 'Submit External Training From Transcript'. The 'Select a Section' dropdown menu is set to 'CSOD Training'. Below the dropdown, there is a table with columns 'Select', 'Title', and 'Status'. The first row has a checked checkbox in the 'Select' column, the title 'Test', and the status 'Co'. A red box highlights the checkbox, and a yellow callout bubble with the number '6' points to it.

Step 7: In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.



The screenshot shows the 'External Training' form with the title 'Submit External Training From Transcript'. The 'Select a Section' dropdown menu is set to 'CSOD Training'. Below the dropdown, there is a table with columns 'Select', 'Title', 'Status', and 'CLP'. The first row has a checked checkbox in the 'Select' column, the title 'Test', the status 'Complete', and the value '8.00' in the 'CLP' column. A red box highlights the 'CLP' field, and a yellow callout bubble with the number '7' points to it.

Add External Training to a Certification (Cont.2)

Step 8: Click **OK** to submit the training for approval. If multiple training items are selected, each item is submitted as a separate request to the certification owner, even though they are submitted at the same time.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Completed	<input type="text" value="8.00"/>

8 **OK** **Cancel**

Your External Training will be submitted for approval. The status of the training will be marked as **Completed(Evidence Needed)** until approved.

CERTIFICATION		
TITLE	CLP	STATUS
Training (Required CLP: Min = 80.00, Max = 80.00 / A		
CSOD Training (Required CLP: Min = 0.00, Max = 8		
Test	8.00	Completed (Evidence Needed)
CLM 090 Sustainable Military Facilities	8.00	Completed
CLM 092 Master Planning Energy and Sustain	8.00	Not Activated

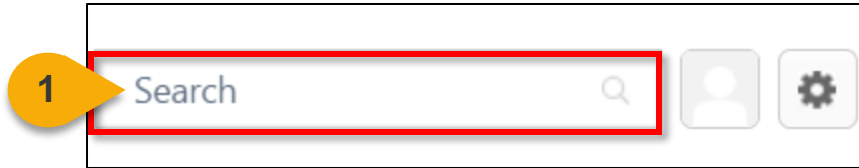
Certifications



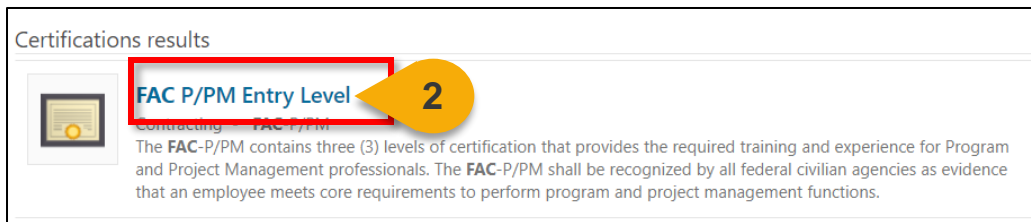
Request and Manage a Certification

When you want to request a Certification...

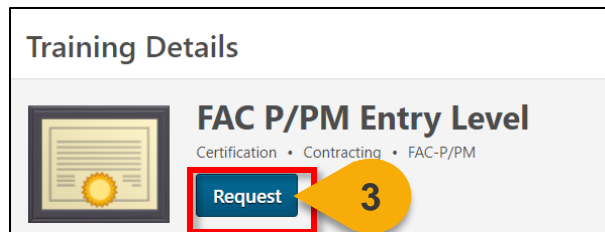
Step 1: In **Global Search**, type in the Certification you wish to request and click the **Magnifying Glass**.



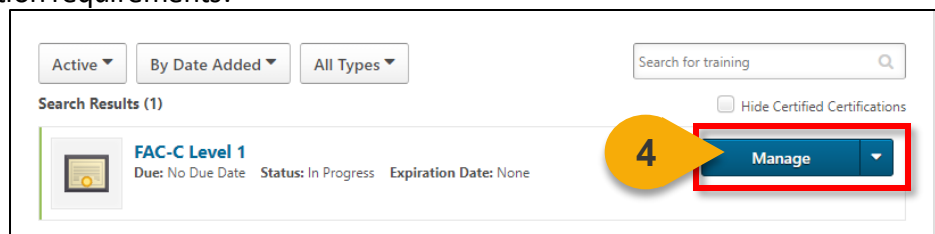
Step 2: Click on the Certification you'd like in the results.



Step 3: Click the **Request** button for the Certification of your choice.

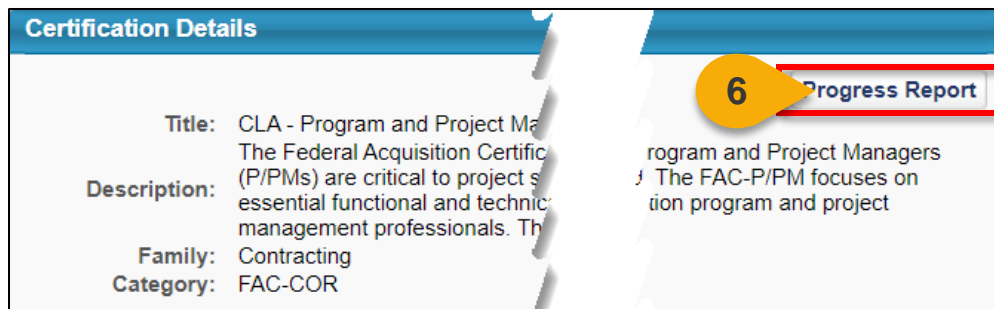


Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.



Request and Manage a Certification (Cont.1)

Step 6: From the Certification Details page, you can see what training needs to be completed to satisfy the certification requirements by clicking **Progress Report**.



Certification Details

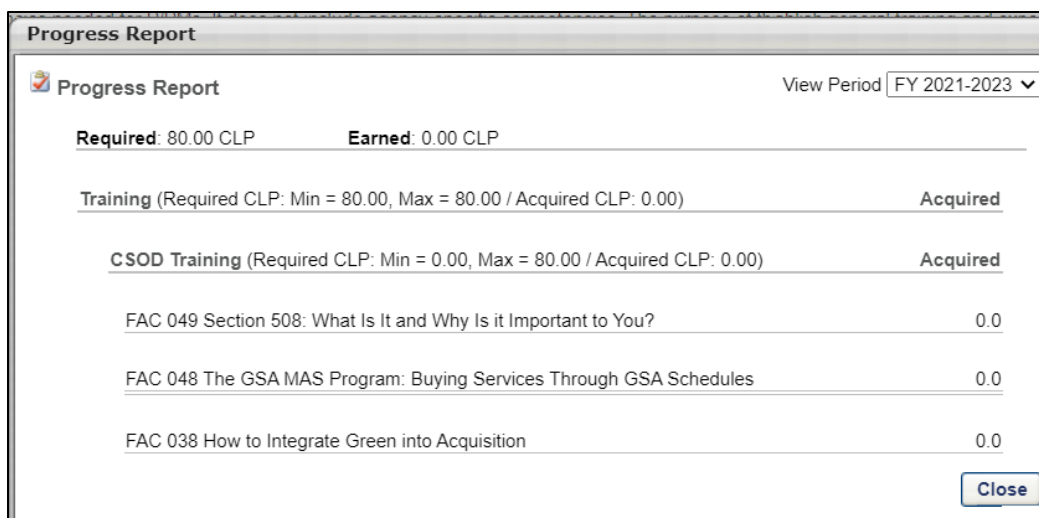
Title: CLA - Program and Project Management
The Federal Acquisition Certification (P/PMs) are critical to project success. The FAC-P/PM focuses on training program and project management professionals. The

Description:

Family: Contracting
Category: FAC-COR

6 **Progress Report**

A popup window will appear that displays the required CLPs, the CLPs earned so far, and list of trainings needed to complete the certification.



Progress Report

View Period: FY 2021-2023

Required: 80.00 CLP **Earned:** 0.00 CLP

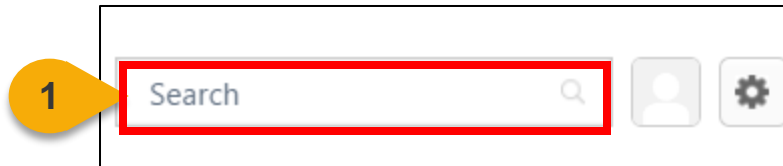
Training (Required CLP: Min = 80.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
CSOD Training (Required CLP: Min = 0.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
FAC 049 Section 508: What Is It and Why Is it Important to You?	0.0
FAC 048 The GSA MAS Program: Buying Services Through GSA Schedules	0.0
FAC 038 How to Integrate Green into Acquisition	0.0

Close

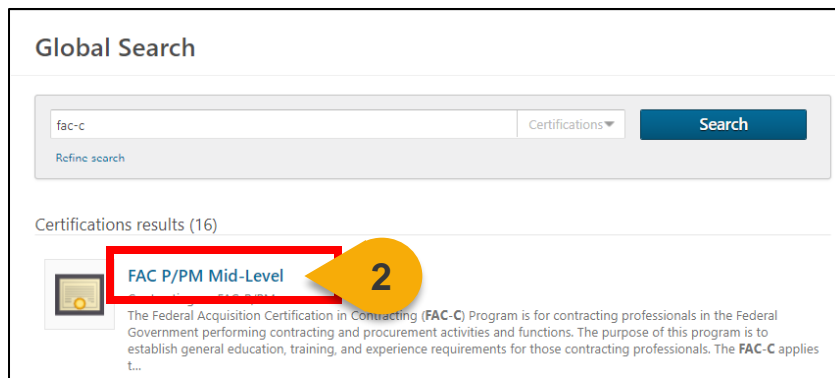
Assign Certifications

When you want to assign a certification to your subordinates....

Step 1: Search for the certification you would like to assign using Global Search, which is located at the upper right-hand corner of the page.



Step 2: Click on the **title** of the certification you'd like to assign.



Step 3: Click **Assign**.



Assign Certifications (Cont.1)

Step 4: Enter any comments as needed in the **Comment Box**.

Assign Certification

FAC P/PM Mid-Level

Certification | Contracting | FAC-P/PM

The Federal Acquisition Certification in Contracting (FAC-C) Program is for contracting professionals in the Federal Government performing acquisition-related duties. The FAC-C applies to all executive agencies, except the Department of Defense (DoD).

COMMENTS

4

Step 5: Select the subordinates you want to assign the certification to by clicking the **checkbox** next to their name. You can assign to both direct and indirect subordinates.

Step 6: Click **Submit**.

DIRECT SUBORDINATES

<input type="checkbox"/> Name
<input type="checkbox"/> F

INDIRECT SUBORDINATES [Indirect Subordinates](#)

Submit

5

6

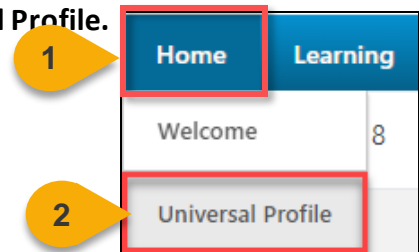
Checklists and Forms



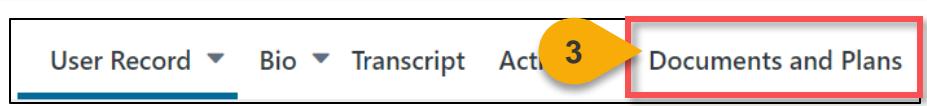
View Submitted Forms

When you want to see the forms you've submitted...

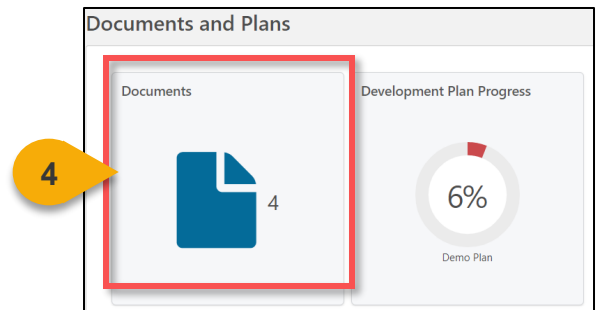
Steps 1 & 2: Hover over Home and click Universal Profile.



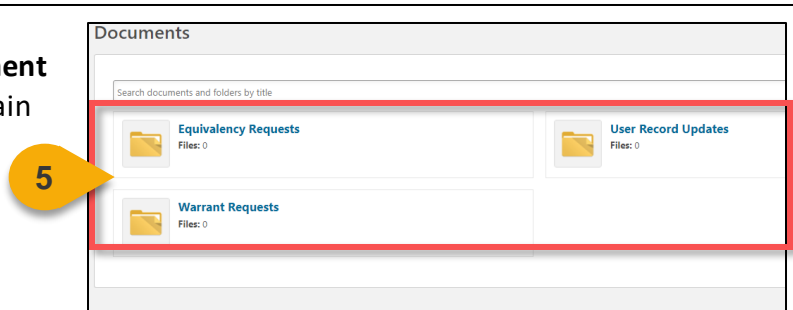
Step 3: Click on Documents and Plans.



Step 4: On the Documents and Plans page, click Documents.



Step 5: On the Documents page, you view your document folders and see which contain files.



Equivalent Requests:
Contains
Equivalent/Fulfillment
Forms you have submitted.

Warrant Requests:
Contains Warrant Forms
you have submitted.

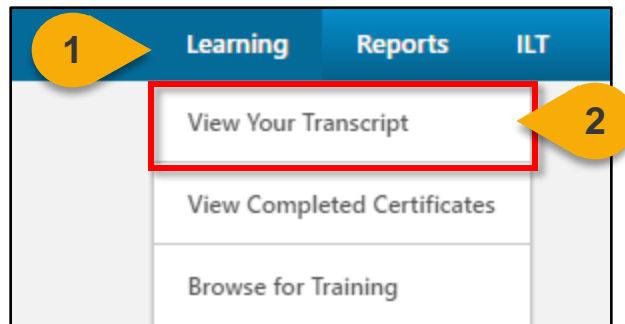
User Record Updates:
Contains User Record
Update Forms you have
submitted.

Request Education/Experience Verification

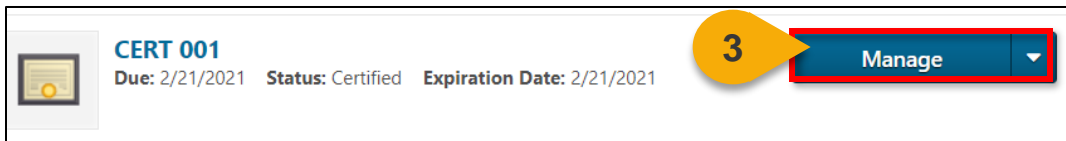
When you need to submit an Education or Experience Verification Checklist for a Certification...

Experience and Education Verification Checklists are used to validate experience and education requirements for Certifications.

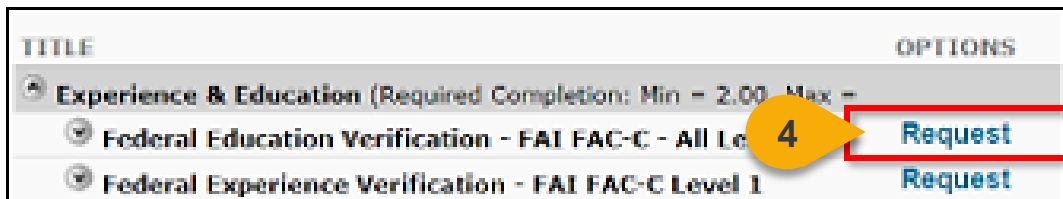
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



Step 3: Click **Manage** next to the certification that you've completed



Step 4: Scroll down until you see **Experience and/or Education Verification** and click **Request**.



Request Education/Experience Verification (Cont.1)

Step 5: After you click on Request. A popup will appear, click **Request** again.

Federal Education Verification - FAI FAC-C - All Levels

☒ **Federal Education Verification - FAI FAC-C - All Levels**

Observation Checklist

Details

Description: Please follow the instructions below to attach documents for this requirement.

1. Click the **Attachments** tab
2. Choose the file you wish to upload.
3. Click **Add**. You can upload up to 3 files.

5 **Request** **Close**

Step 6: Click on **View Checklist**.

CERTIFICATION

TITLE

Options

6 **View Checklist**

Experience & Education (Required Completion: Min = 1.00, Max = 1.00 / Ac)

Federal Experience Verification - FAI FAC P/PM Senior Level

Step 7: Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

My Checklists

Birdie Winters

Checklist Summary

7 **Checklist Summary**

Federal Experience Verification - FAI FAC P/PM Senior Level

Name	Status	Rating/Score	Progress
Federal Experience Verification - FAI FAC P/PM Entry Level	Not Started	-	0%
Federal Experience Verification - FAI FAC P/PM Senior Level	Not Started	-	0%

Request Education/Experience Verification (Cont.2)

Step 8: Click on **Federal Education/ Experience Verification** to view instructions for the checklist.

Checklist Summary

Federal Experience Verification...

Checklist Summary

Federal Education Verification

Step 9: Click on the **Rating Scale** tab to view the rating scale for the checklist.

Checklist Summary

Federal Experience Verification...

Federal Experience Verification...

9 Rating Scale Attachments

Score	Rating
0	Does not meet criteria
1	Meets Criteria

Step 10: Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review.

Overview

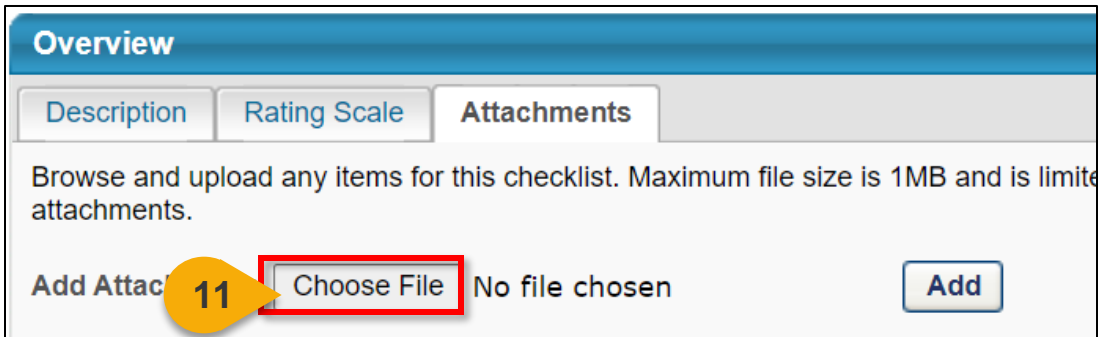
Description Rating S Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and

Add Attachment: Choose File No file chosen Add

Request Education/Experience Verification (Cont.3)

Step 11 : Click **Choose File** to add a copy of your resume or other relevant documents.



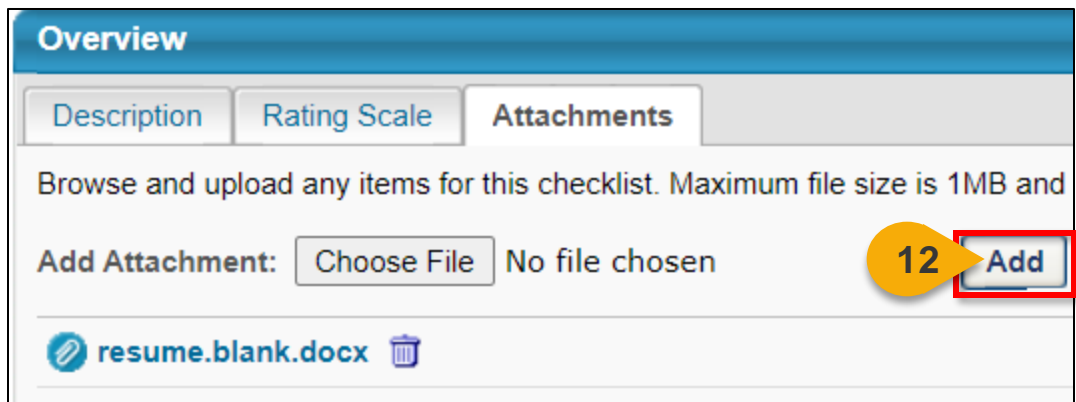
Overview

Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment **11** Choose File No file chosen Add

Step 12 : After you select the file, click **Add** to add the file to your Checklist.



Overview

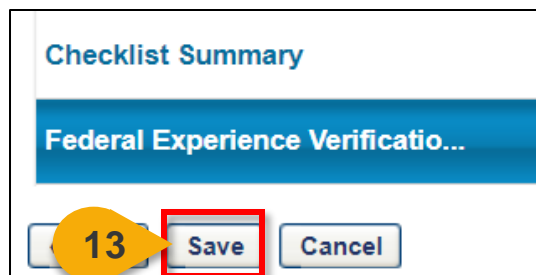
Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment: Choose File No file chosen **12** Add

resume.blank.docx

Step 13: Once all the desired attachments have been added (up to 3), click **Save**. The Checklist will be routed for approval.



Checklist Summary

Federal Experience Verification...

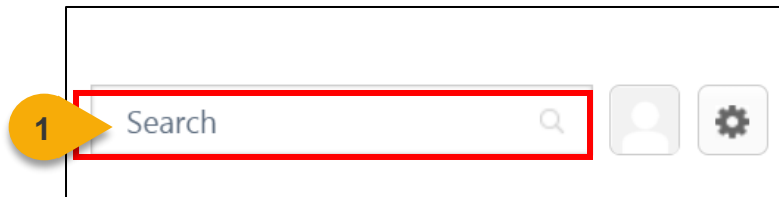
13 Save Cancel

Submit an Equivalency/Fulfillment Form

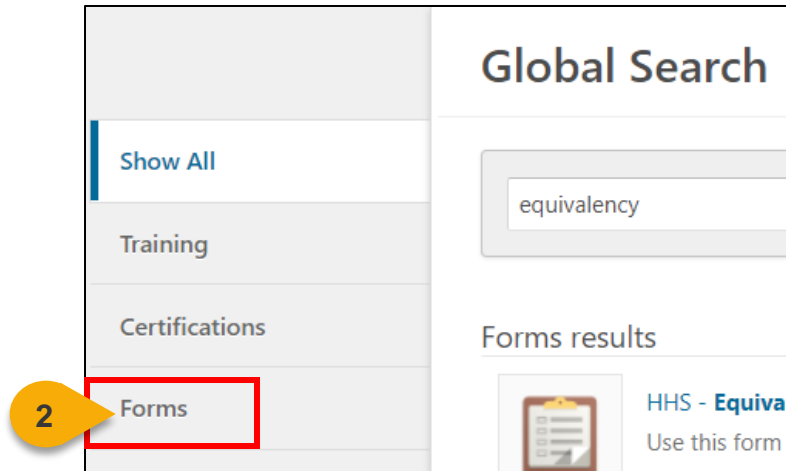
When you want to request Equivalency or Fulfillment for a Course...

Use Global Search to find the Equivalency/Fulfillment form.

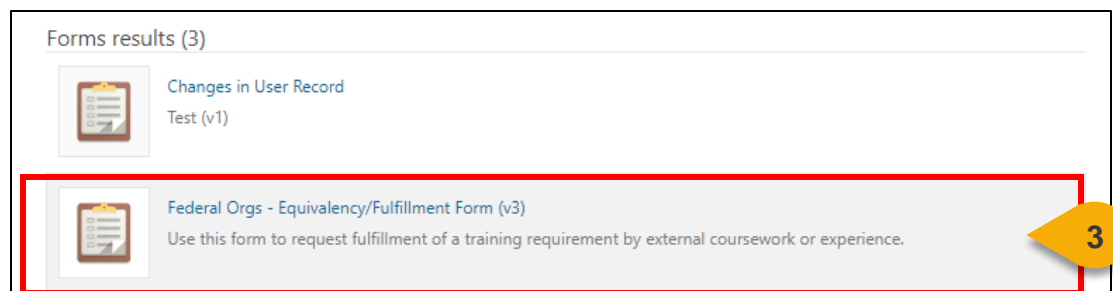
Step 1: Enter **Equivalency** in the Search box and click the Magnifying Glass.



Step 2: Click on **Forms**.



Step 3: Click on the **Equivalency/Fulfillment Form** for your agency.




Submit an Equivalency/Fulfillment Form (Cont.1)

Step 4: Select the **dropdown arrow** to choose the course for which you would like an equivalency.


Equivalency & Fulfillment Request
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.

Please Select the Course You Would Like Equivalency For


Select  **4**

Step 5: Select the **course** from the dropdown menu.

Please Select the Course You Would Like E

Select 


✓ Select **Please List.**

5  ACQ 370 (FED)
AQN PBA


Step 6: If the course you are trying to request an equivalency for is not available, you can enter it in the **Other** textbox.

Equivalency & Fulfillment Request
Please provide the information below to indicate how you have

Please Select the Course You Would Like Equivalency For

Select 

If You Selected "Other", Please List.


6 

Submit an Equivalency/Fulfillment Form (Cont.2)

Step 7: Click the **calendar** icon to enter the Training Start and End dates.


7

Training Start Date:



Select the equivalent training start date.


Training End Date:



Select the equivalent training end date.

Step 8: Click **Select File** to add any supporting documentation.

If Requesting Course Equivalency, Attach Course Completion Certificate Here.

Drag and drop file **8** 

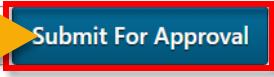
Step 9: Enter any supporting comments in the **Employee Remarks** field.

9

Employee Remarks:

2000 characters maximum.

Step 10: Click **Submit for Approval** to route to Equivalency and Fulfillment Approvers.

10 

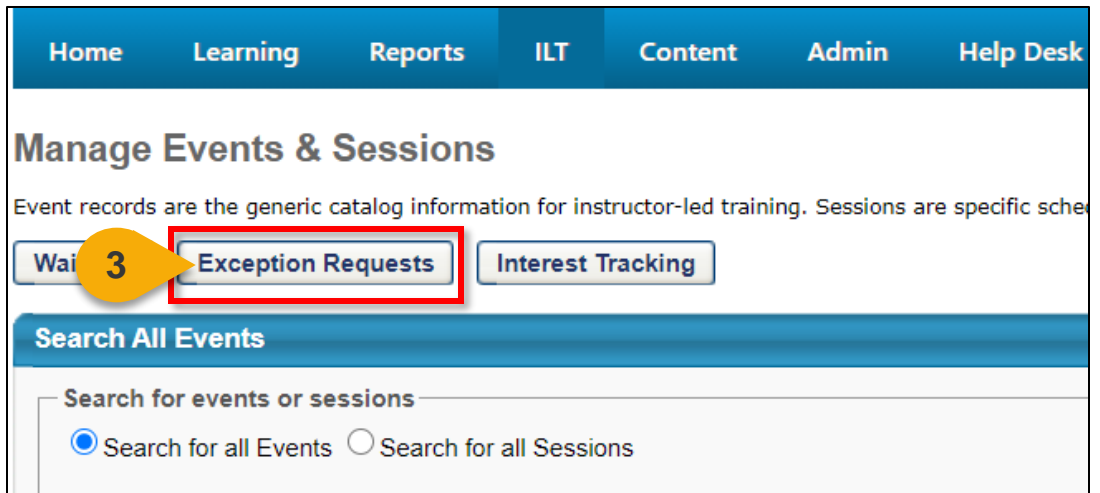
Approve or Deny Exception Requests

When you want to deny or grant an exception request...

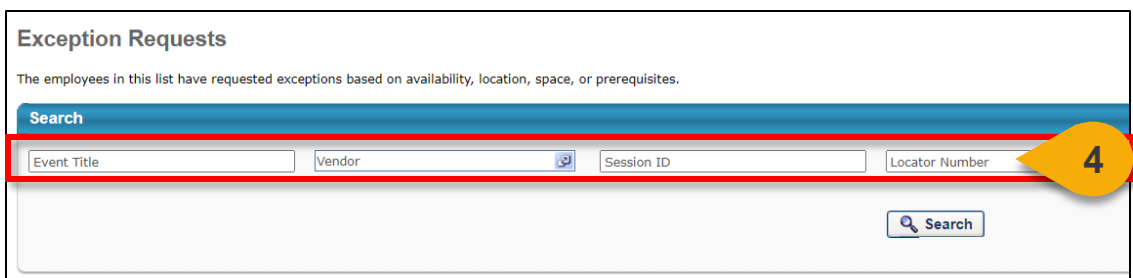
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions**.



Step 3: Click on **Exception Requests** to view all pending Exception Requests.



Step 4: You will be taken to the Exception Requests page. Search for the Event you would like to process requests for by entering the **Event Name, Vendor, Session ID, or Locator Number** in the search fields.



Approve or Deny Exception Requests (Cont.1)

Step 5: The Users with pending requests will populate in the bottom section of the screen. Click Respond to deny or grant a User's Exception Request.

Exception Requests

The employees in this list have requested exceptions based on

Search

Event Title Vendor

Users

Current Past Requests

[Export to Excel](#)

(46 Results) 1 2 3 > >>

Employee	User ID	Organization	Session Start Date	Respond
		Justice Main	1/4/2021 8:00	Respond
		Department	1/4/2021 8:00 AM	Respond

Step 6: Enter a comment in the Response text field that gives an explanation to the Exception Request.

Respond

Respond

Employee: [Redacted]

Event: ACQ 265 (FED): Mission Focused Services Acquisition

Session: [Redacted] Date: 1/4/2021 8:00 AM - 1/7/2021 5:00 PM EST

Request Detail: [Redacted]

* Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Response: [Text Field]

[Cancel](#) [Grant](#) [Deny](#)

Approve or Deny Exception Requests (Cont.2)

Step 7: Click **Grant** or **Deny** to respond to the Exception Request. You will be taken back to the Exception Request page after making your selection.

Respond

Respond

Employee: [Redacted]

Event: ACQ 265 (FED): Mission Focused Services Acquisition

Session: [Redacted] Date: 1/4/2021 8:00 AM - 1/7/2021 5:00 PM EST

Request Detail: [Redacted]

* Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Response:

7

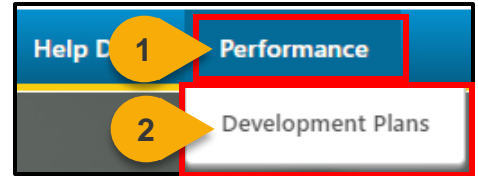
Individual Development Plans



Create an IDP

When you want to create an IDP...

Steps 1 & 2: Hover over **Performance** and click on **Development Plans**.



Step 3: Click on the **Create New Plan** button.



Step 4: Add a **Plan Title** and **Description** to your IDP.

A screenshot of the 'Create a Plan' form. The 'Plan Title' field is highlighted with a red border and a yellow callout bubble with the number '4'. The 'Description' field is also highlighted with a red border. The form includes a breadcrumb trail: Home > Snapshot > Dev Plan List > Create a Plan. The 'General Information' section contains the 'Plan Title*' and 'Description' fields. The 'Description' field has a rich text editor with various formatting options (B, I, S, U, T, H1, H2, H3, H4, H5, H6, etc.) and a list of bullet points: 'Develop skills in the areas of program management and task delegation in order to improve leadership skills. This will be done by: - Shadowing Senior Associates - Taking internal and external training courses on mangement and leadership skills - Joining efforts on the job that allow for demonstration of program managment'.

Step 5: Click on the **Add Objective** button in the Development Objectives section.

A screenshot of the 'Development Objectives' section. The 'Add Objective' button is highlighted with a red border and a yellow callout bubble with the number '5'. The section includes a header 'Development Objectives', a stack of documents icon, and a message: 'There are no development objectives. Would you like to add one?'.

Create an IDP (Cont. 1)

Step 6: Enter an **Objective Title**.

Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

6

Step 7: Select a category from the **Category** dropdown.

Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

Category

Development Objectives

7

Step 8: Add **Development Actions**. Under Learning and Development there are three options you can utilize to add training/development actions to your Objective: **Search for Training**, **Browse Recommended**, and **Add Development Action**.

Learning and Development

8

Search For Learning

Find learning opportunities to help you achieve your objective.

Browse Recommended

Browse learning and development actions that are recommended for you.

Add Development Action

Create your own actions to make your objective happen.

Search for Learning:
Encompasses training sessions provided. It allows you to select online sessions.

Browse Recommended:
Allows you to select learning and development courses.

Add Development Action:
Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Create an IDP (Cont. 2)

Step 8a: To add training courses available online in Cornerstone, click on **Search For Learning**.

Learning and Development

Search For Learning **8a** **Browse Recommended** **Add Development Action**

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

Step 8b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.

TYPE

SUBJECT

DURATION

Step 8c: The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

The results will be updated on the screen based on the filters you select.

TYPE

☐ Curriculum

☒ Event

☐ External Content

☒ Material

☒ Online Class

☐ Test

SUBJECT

DURATION

Create an IDP (Cont. 3)

Step 8d: You may also search for a specific training course using the **Search bar**.

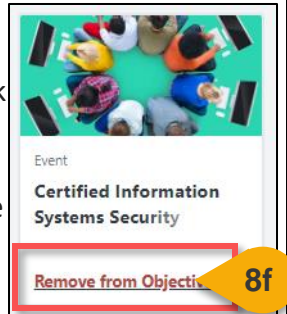
8d

Search For Learning

Step 8e: Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



Step 8f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



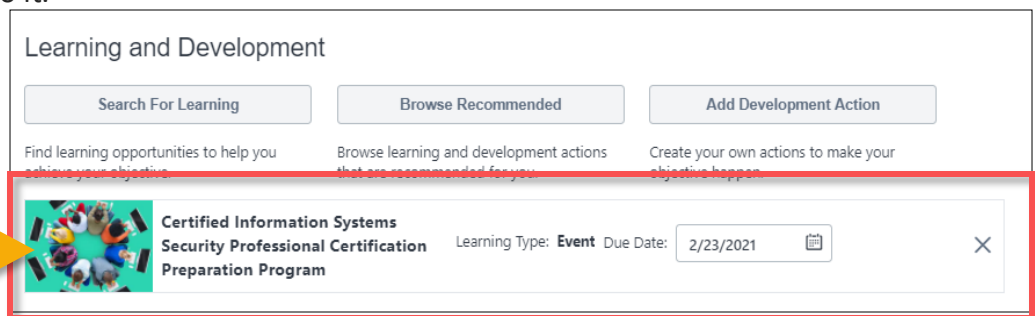
Step 8g: Once you are done selecting the training courses to be added to your Objective, click **Return to Objective** at the bottom of the page.

8g

Return to Objective

Step 8h: The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X** icon next to it.

8h



Create an IDP (Cont. 4)

Step 9a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.

Learning and Development

Search For Learning	Browse Recommended	9a Add Development Action
Find learning opportunities to help you achieve your objective.	Browse learning and development actions that are recommended for you.	Create your own actions to make your objective happen.

Step 9b: A pop-up window will appear on the screen. You must add a description to your development action in the **Description** field.

Development Action

9b Description*

Step 9c: Select the **activity type** from the Activity Type dropdown menu.

Activity Type

9c Select...

- Outside Training
- Additional Learning
- Coaching/Mentoring
- On the Job
- Reading
- Shadowing

Step 9d: Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.

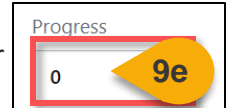
Due Date*

2/23/2021

9d 

Create an IDP (Cont. 5)

Step 9e: Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".

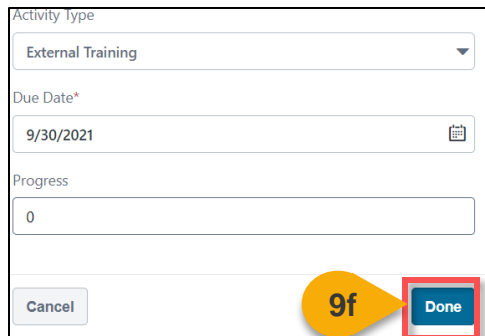


Progress

0

9e

Step 9f: Click **Done** to add the activity to your IDP.



Activity Type

External Training

Due Date*

9/30/2021

Progress

0

Cancel

Done

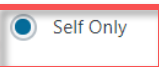
9f

Step 10: Under Assignment, select **Self Only** to assign this IDP to yourself. If you are a Supervisor, you can assign this IDP to your employees. To assign IDPs to employees, view the Manager task aids.

Assignment

Select the criteria that defines who will be included in this assignment

10



☒ Self Only

Step 11: To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.

11



☒ Designate this as the Primary Plan for assignees

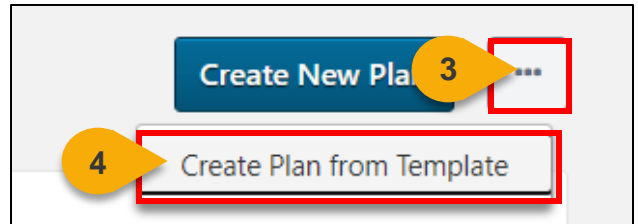
Create an IDP from a Template

When you want to create an IDP using a template...

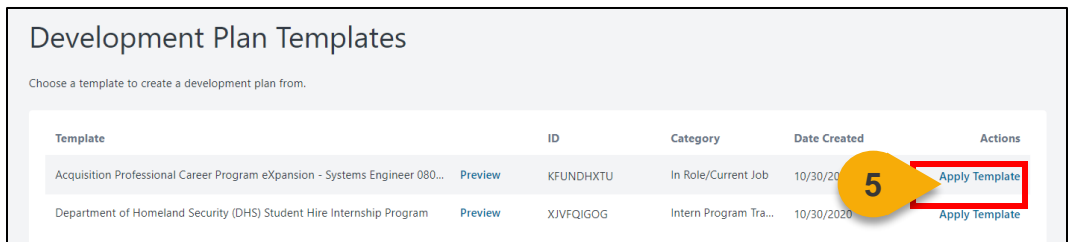
Steps 1 & 2: Hover over **Performance** and click on **Development Plans**.



Steps 3 & 4: Click on the **ellipsis** and then choose **Create Plan from Template**.



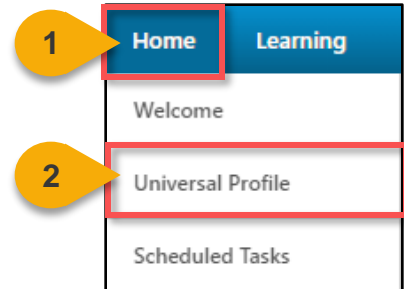
Step 5: Select the template you want to use and click **Apply Template**. You can edit the template or submit it for approval as-is.



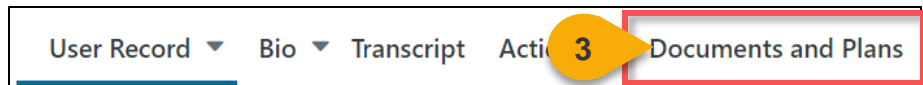
Update IDP

When you want to update an IDP Objective, Training or Action Step...

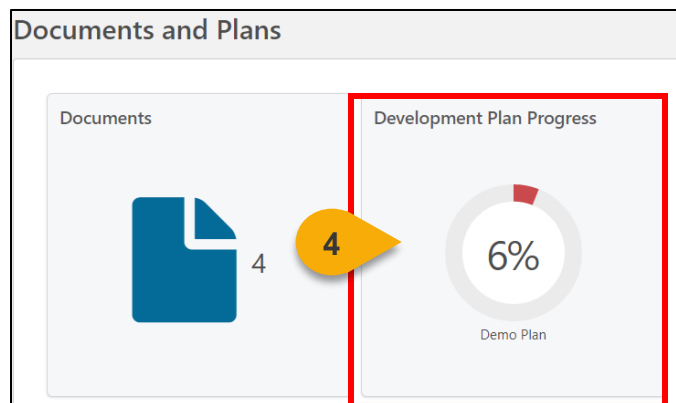
Steps 1 & 2: Hover over **Home** then navigate to **Universal Profile**.



Step 3: Click on the **Documents and Plans** tab.



Step 4: Click on the **Development Plan Progress** widget.

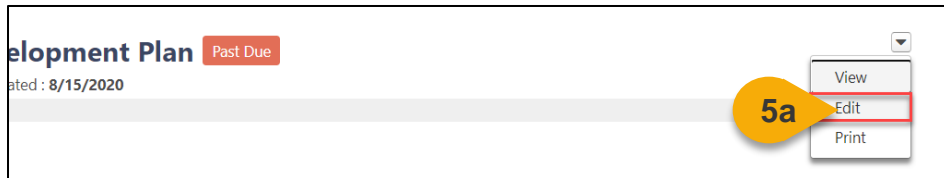


Note: You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

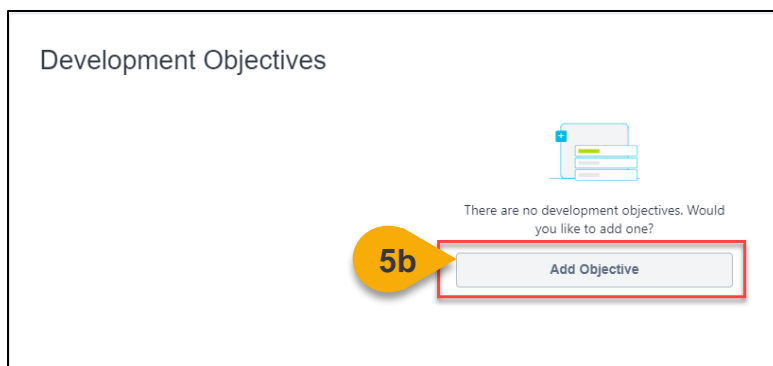
Update IDP (Cont. 1)

If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

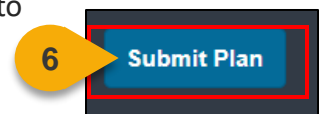
Step 5a: Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.



Step 5b: Click on the **Add Objective** button and create the new Objective (see Creating IDPs task aid for further assistance).



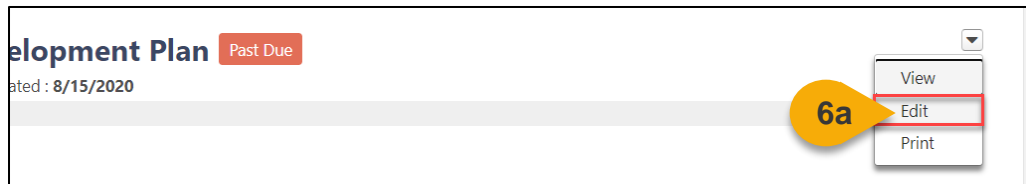
Step 6: Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



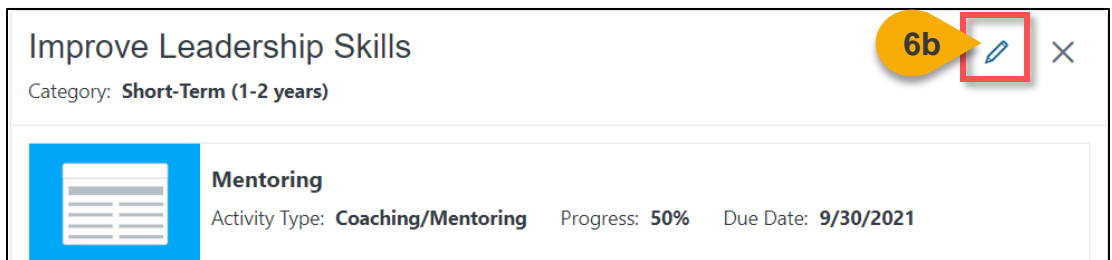
Update IDP (Cont. 2)

If you only wish to update a Training or Action Step on an Objective in your IDP, follow the steps 6a – 6g on the following pages.

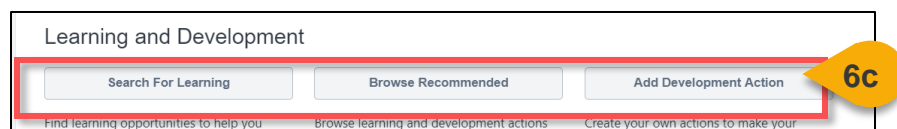
Step 6a: Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



Step 6b: Select the **Edit** icon next to the Objective for which you want to update Training or Actions Items.



Step 6c: To add training or Development Actions, choose from the options within **Learning and Development**.






Update IDP (Cont. 3)

Step 6d: You can edit Development Actions by clicking on the **Edit** icon next to it. When in editing mode, you can update anything in the Development Action, including its progress. You can only cancel IDPs after they've been approved.

Learning and Development

Search For Learning Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.





 **Attend Leadership Conference in San Diego, CA** Activity Type: **Outside Training** Progress: **0%** Due Date: **2/23/2021**   **6d**

Step 6e: For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.

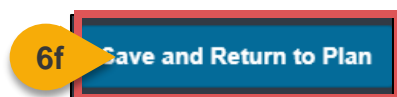
Learning and Development

Search For Learning Browse Recommended Add Development Action

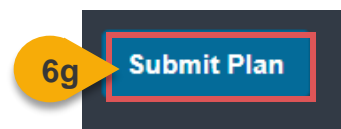
Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

 **Attend Leadership Conference in San Diego, CA** Activity Type: **Outside Training** Progress: **6e** **2/23/2021**   

Step 6f: Once all the changes have been made to your IDP's Objective, click on the **Save and Return to Plan**.



Step 6g When ready, click **Submit Plan** to resubmit the IDP for approval.



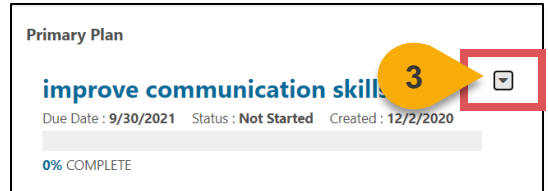
Cancel IDP

When you want to cancel an IDP...

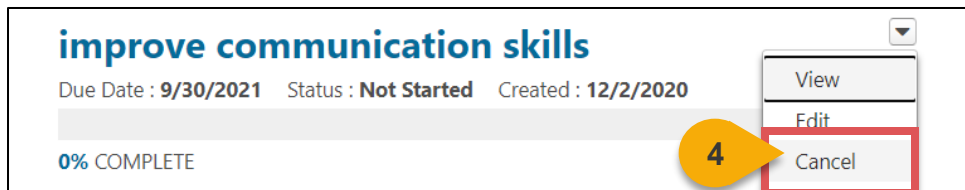
Steps 1 & 2: Hover over the **Performance** tab and then click **Development Plans**.



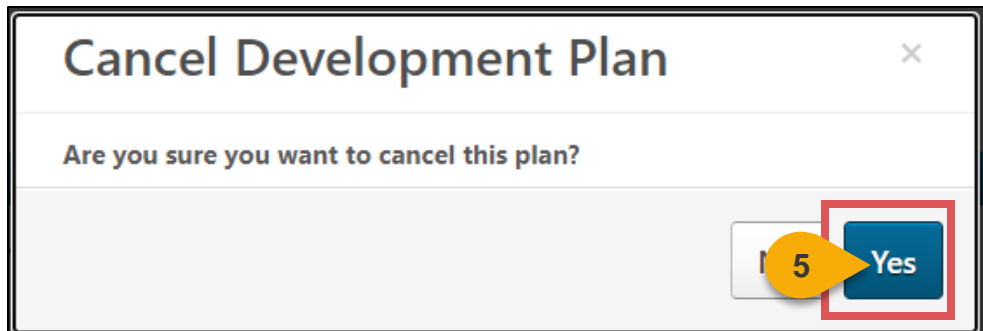
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



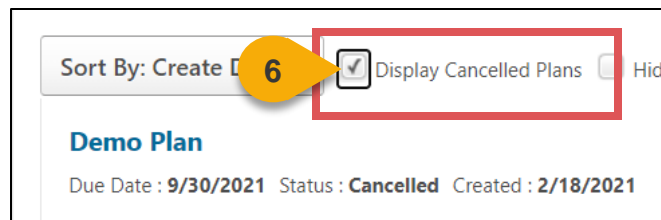
Step 4: Select **Cancel** from the dropdown menu.



Step 5: A popup will appear. Select **Yes** to cancel the IDP.



Step 6: Click the **checkbox** for Display Cancelled Plans to view the IDP you cancelled.



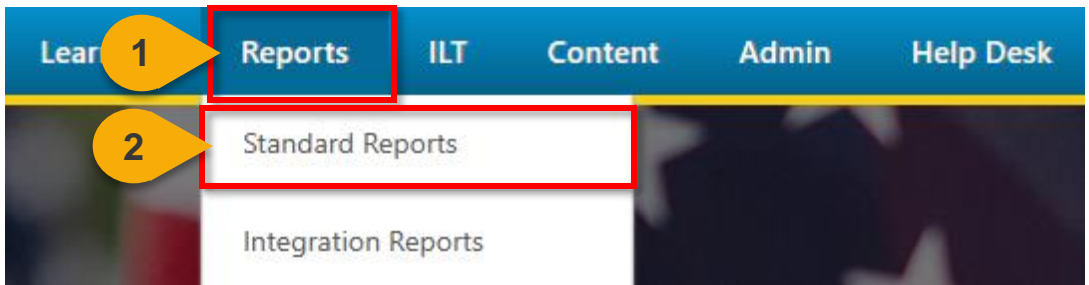
Reports



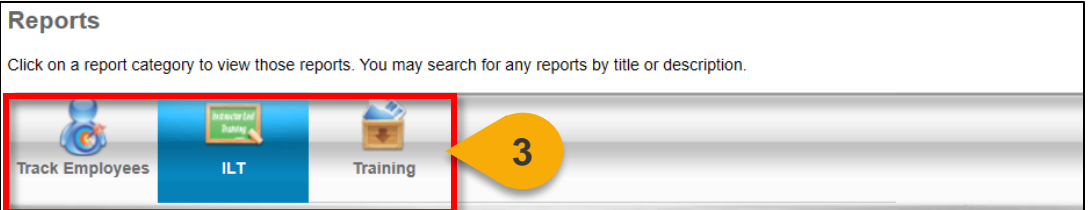
View Standard Reports

When you want to view Standard Reports...

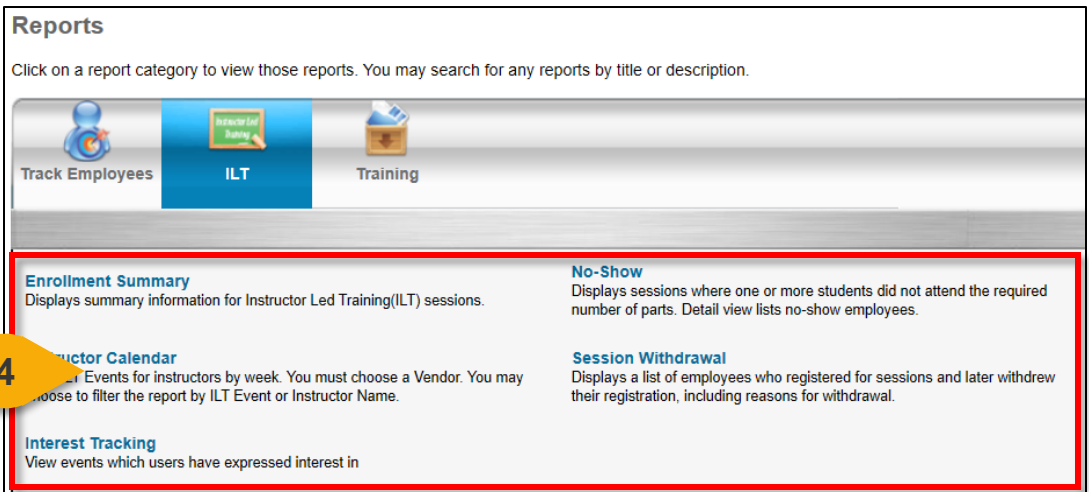
Steps 1 & 2: Hover over the Reports tab and then click Standard Reports.



Step 3: Choose the Report Category.



Step 4: Select the type of report you would like to view by clicking on the **name of the report**.



View Standard Reports (Cont.1)

Step 5: Enter data into the filters you would like to apply to the report. The filters available will vary depending on the report selected. The system will alert you if you try to run a Standard Report with required fields missing.



Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.


Date Filters



Date Criteria: From: To:



Advanced Filters

5




Facility :  

Vendor : 

Instructor :  (Please Select Vendor First) 

Event :  

Locator Number :

 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

Step 6: Choose how you would like the report to export: Printable Version, Export to Excel, or (when available), Export to Text. The file will download to your computer.



Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.


Date Filters



Date Criteria: From: To:



Advanced Filters

6




Facility :  

Vendor : 

Instructor :  (Please Select Vendor First) 

Event :  

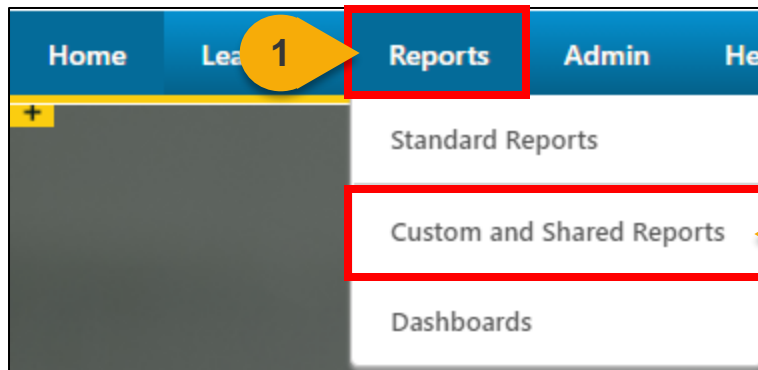
Locator Number :

 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

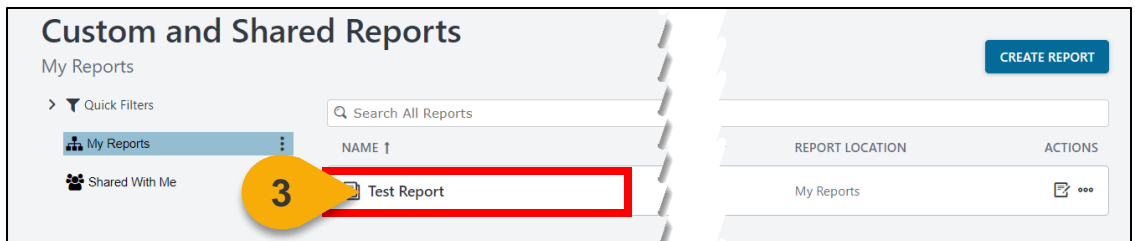
View Custom Reports

When you want view custom or shared reports...

Steps 1 & 2: Navigate to **Reports**, then select **Custom and Shared Reports**.

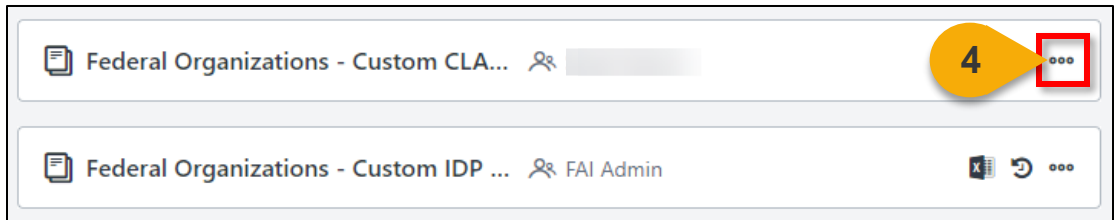


Step 3: You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

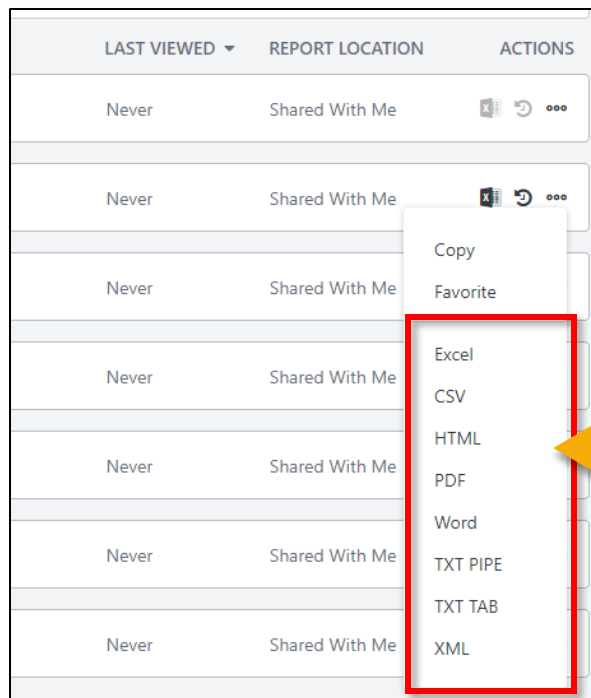


View Custom Reports (Cont.1)

Step 4: To see other report format options, click the ellipses (...) icon.



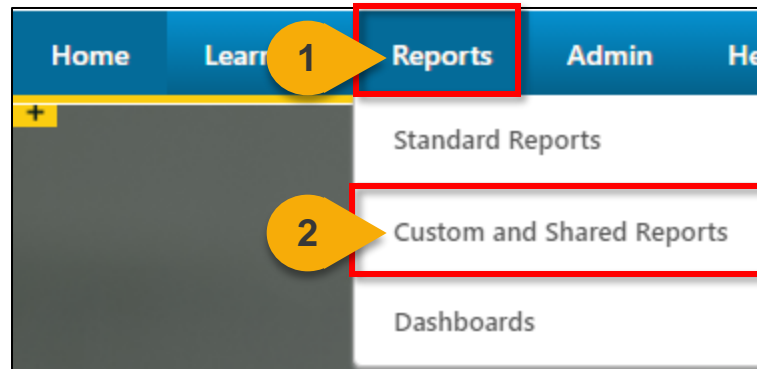
Step 5: Click the **file format** you wish to download. It will download to your computer.



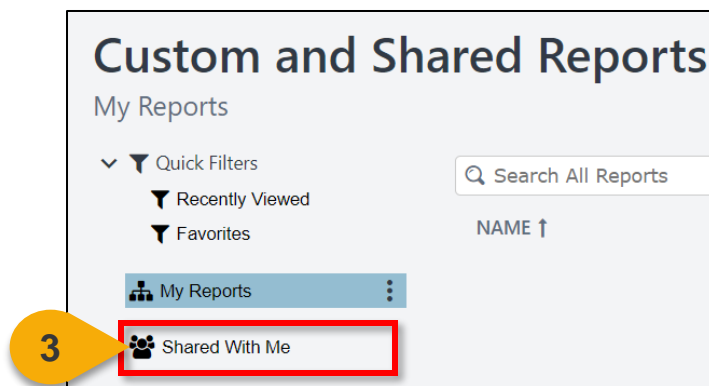
Filter and Download Custom Reports

When you want to filter and download a report...

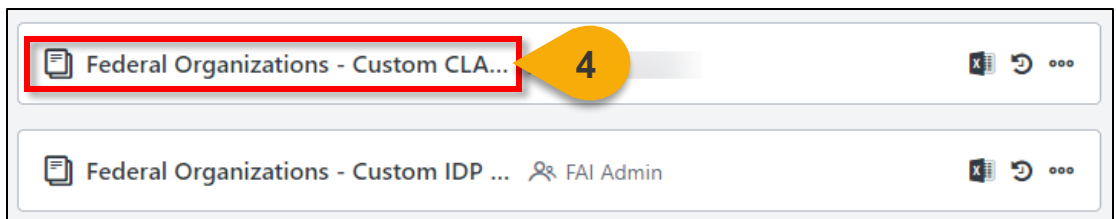
Steps 1 & 2: Navigate to the Reports tab and then select Custom and Shared Reports.



Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



Step 4: Click the **Report Name** you want to view to update the report filters.



Filter and Download Custom Reports (Cont. 1)

Step 5: Update the filters as needed. The filters will vary based on the report.

▼ Filters

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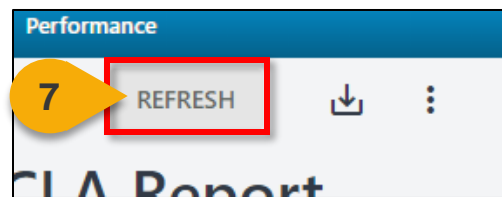
Certifications - Certification Category is equal to FAC-C Continuous Learning

AND

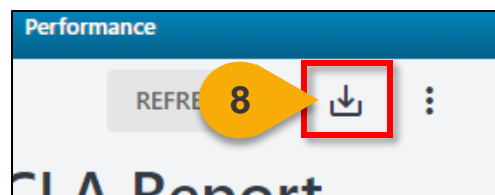
Certifications - Certification User Status is one of Select...

Calculated Fields - Days Until Certification Period Due is greater than 0

Step 7: Click Refresh in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



Step 8: Click the Download Options icon in the top right corner to see the formats available for this report.



Step 9: Choose the File Format in which you would like to download the report. The report will download to your computer.

